

CAREWare 6
June 2019



User Manual

Adapted from HRSA Quick Start User Guides:
<https://hab.hrsa.gov/program-grants-management/careware>

PLEASE NOTE: The client data used in these manuals is purely fictional.

What is CAREWare?

CAREWare is free, scalable software for managing and monitoring HIV clinical and supportive care. The HIV/AIDS Section, Florida Department of Health (Department), uses CAREWare to track services funded by Ryan White Part B, Patient Care Network, Housing Opportunities for Persons with AIDS (HOPWA) and General Revenue. A number of agencies that are funded by other sources have joined the Section's CAREWare network. This arrangement contributes greatly to the Section's ability to track service usage and monitor the quality of care across multiple providers. In fact, the Department of Health's CAREWare network is the largest in the world, with over 100 participating agencies.

The purpose of this manual is to demonstrate proper methods of data entry into CAREWare. This manual does not encompass every field and functionality available in the application. There are a number of features/fields that most users will not use that are not detailed. If you have any questions about using CAREWare, please call the Help Desk at 1-850-245-4744.

When submitting a ticket to the Help Desk, do not include any client identifying information in the ticket or voicemail; In these circumstances, please simply inform the Help Desk operator that you need client data changed and CAREWare staff will get the specific client information when they return your call. For a listing of information that is confidential, see Appendix A -- Confidential CAREWare Client Identifiers.

Protocol for Breaches of Confidentiality of CAREWare Data

The highest priority of those working within the CAREWare network is to safeguard client information. This protocol outlines the steps that will be taken when there is a breach of protected health information entered into CAREWare. The protocol is intended to supplement DOHP 50-10-10 Information and Security Policy or local policies written to conform to the security requirements of Department of Health HIV/AIDS patient care contracts and subcontracts. More restrictive state or federal rules, regulations or laws take precedence over this protocol.

Definitions:

1. *Breach of confidentiality of CAREWare data* -- Occurs when individual identifiers, as described in "Confidential CAREWare Client Identifiers" (Appendix A), are accessed by or shared with person(s) who are not legally authorized to know a client's HIV status or other protected health information.
2. *Electronic breach of confidentiality of CAREWare data* -- Occurs when individual identifiers, as described in "Confidential CAREWare Client Identifiers" (Appendix A), are electronically transmitted unencrypted, or accessed or shared with person(s) who are not legally authorized to know a client's HIV status or other protected health information.

Protocol for Breaches of Confidentiality of CAREWare Data (continued)

Procedure:

1. For a first offense of breach of confidentiality of CAREWare data:
 - a. The HIV/AIDS Section (HAS) will notify the user of the breach and the user will be locked out of CAREWare until the steps in paragraphs 1.b-d are completed.
 - b. HAS will notify the user's supervisor and/or the executive administrator of the user's organization of the seriousness of this issue and require an acknowledgement by their supervisor/administrator in writing. An email to the HAS staff making the notification is acceptable written acknowledgement.
 - c. HAS staff will report the breach to HAS's Information Security and Privacy Coordinator, who will submit an Incident Report. Depending on the severity of the breach, the Incident Report will be sent to the Division of Disease Control and Health Protection's (Division) security officer or the Department's Inspector General for review.
 - d. If an electronic breach of confidentiality of CAREWare data is by unencrypted transmission via email, the sender and all recipients will be instructed to double- or triple-delete the email, depending on the sender's and recipients' email program(s). The HAS staff member who reports the breach is responsible for notifying Department staff to delete the email. The user is responsible for notifying all other recipients.
2. For a second offense of breach of confidentiality of CAREWare data:
 - a. HAS will notify the CAREWare user of the breach and the user will be locked out of CAREWare.
 - b. HAS will notify the user's supervisor and/or the executive administrator of the user's organization of the seriousness of this issue and require an acknowledgement by their supervisor/administrator in writing. An email to the HAS staff making the notification is acceptable written acknowledgement.
 - c. HAS staff will report the breach to the HAS' Information Security and Privacy Coordinator, who will submit an Incident Report. Depending on the severity of the breach, the Incident Report will be sent to the Division security officer or the Department's Inspector General for review.
 - d. If an electronic breach of confidentiality of CAREWare data is by unencrypted transmission via email, the sender and all recipients will be instructed to double- or triple-delete the email, depending on the sender's and recipients' email program(s). The HAS staff member who reports the breach is responsible for notifying Department staff to delete the email. The user is responsible for notifying all other recipients.
 - e. If the supervisor/executive director wants the user to have access to the system after the second breach, the supervisor/executive director will send in a written request (email is acceptable) to HAS asking that the user be granted access to CAREWare.
 - f. An internal HAS panel comprising representatives of the Division's information security officers, the HIV/AIDS Surveillance Unit and the HIV/AIDS Patient Care Community Programs Unit will review the incident. The panel will meet as soon as possible and decide the appropriate remedy for the violation.
 - g. If the user or their organization disagrees with the decision of the panel, they may appeal the decision to the HAS administrator.
3. For a third or subsequent offense of breach of confidentiality of CAREWare data:
 - a. HAS will notify the CAREWare user of the breach and the user will be permanently locked out of CAREWare.
 - b. HAS will notify the user's supervisor and/or the executive administrator of the user's organization and require an acknowledgement by their supervisor/administrator in writing. An email to the HAS staff making the notification is acceptable written acknowledgement.

Protocol for Breaches of Confidentiality of CAREWare Data (continued)

- c. HAS staff will report the breach to the HAS' Information Security and Privacy Coordinator, who will submit an Incident Report. Depending on the severity of the breach, the Incident Report will be sent to the Division security officer or the Department's Inspector General for review.
- d. If an electronic breach of confidentiality of CAREWare data is by unencrypted transmission via email, the sender and all recipients will be instructed to double- or triple-delete the email, depending on the sender's and recipients' email program(s). The HAS staff member who reports the breach is responsible for notifying Department staff to delete the email. The user is responsible for notifying all other recipients.
- e. The user or their organization may appeal the permanent lock-out to the HAS administrator.

Confidential CAREWare Client Identifiers

The following identifiers of an individual, or of relatives, employers or household members of an individual, are considered confidential for the purposes of the sharing of CAREWare data.

You cannot share any of these identifiers electronically unless the electronic transmission is encrypted. This list is not exhaustive; please contact the HIV/AIDS Section Applications Help Desk at 850-245-4744 if you have any questions. Again, if you must make a change to a client's record, client identifiers should be communicated to the CAREWare team via phone-call (not through voicemail) or email (**only** if you are using a state email address, as it is encrypted).

CAREWare Data Fields

Information in the DEMOGRAPHICS TAB

- Legal First Name
- Any alias or nickname
- Middle Name
- Legal Last name
- Date of Birth (except year; and all ages over 89 and all elements of dates [including year] indicative of such age, except that such ages and elements may be aggregated into a single category of age 90 or older)
- Address
- City
- Zip Code
- County
- Phone Number
- HIV+ Date (except year)
- AIDS Date (except year)
- Deceased Date (except year)
- Enrl Date (except year)

Confidential CAREWare Client Identifiers (continued)

Information in the SERVICE TAB

Service Details

- Date (except year)

Information in the ENCOUNTERS TAB

1. Vital Signs Sub-Tab

- Estimated Conception Date (except year)
- Prenatal Begin Date (except year)
- Delivery/Outcome Date (except year)

2. Medications Sub-Tab

- Every time medication is prescribed complete as applicable: Start, Stop, Correct Data Error, or Change Dose (except year)

3. Labs Sub-Tab

- Test Date (except year)

4. Screening Labs Sub-Tab

- Test Date (except year)

5. Screening Sub-Tab

- Test Date (except year)
- Action Date (except year)
- Annual TB Screening Date (except year)
- Pap (except year)

6. Immunizations Sub-Tab

- Hep B, Date of Shots (except year)
- Hep C, Date of Shots (except year)

Information in the UNIQUE ID TAB

- Do not e-mail any scanned document unencrypted
- Medicaid #
- Medicare #
- PAC #
- Social Security #
- Date eligibility expires (except year)

Required Information in the FORMS TAB

- Eligibility Staff Assessment Worksheet
- Insurance Waiver Form
- Notice of Eligibility or Ineligibility
- Six Month Recertification

Confidential CAREWare Client Identifiers (continued)

Protected Health Information, as per 45 CFR 164.514

- Names
- All geographic subdivisions smaller than a state, including street address, city, county, precinct and zip code
- All elements of dates (except year) for dates directly related to an individual, including birth date, admission date, discharge date, date of death; and all ages over 89 and all elements of dates (including year) indicative of such age, except that such ages and elements may be aggregated into a single category of age 90 or older
- Telephone numbers
- Fax numbers
- Electronic mail addresses
- Social Security numbers
- Medical record number
- Unique Record Number (URNs)
- Health plan beneficiary numbers
- Account numbers
- Certificate/license numbers
- Vehicle identifiers and serial numbers, including license plate numbers
- Device identifiers and serial numbers
- Web Universal Resource Locators (URLs)
- Internet Protocol (IP) address numbers
- Biometric identifiers, including finger and voice prints
- Full face photographic images and any comparable images
- Any other unique identifying number, characteristic or code

CAREWare 6



Section 1:

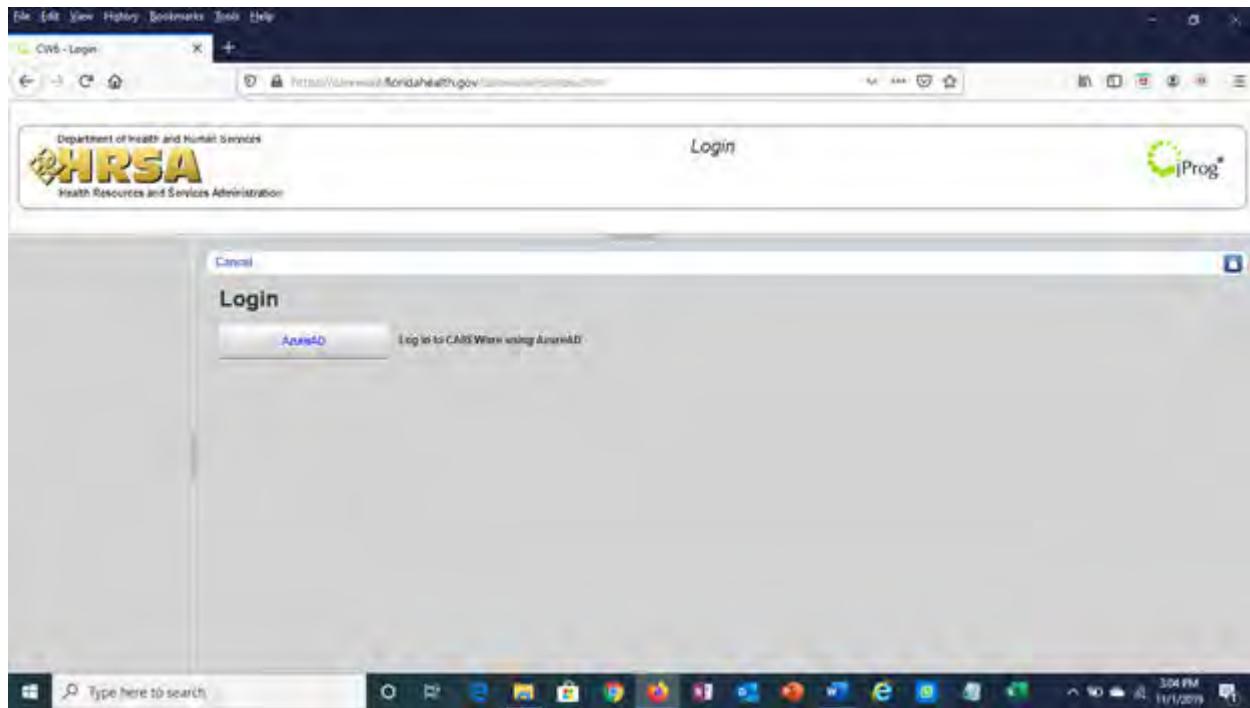
Navigating CAREWare Version 6.0

Adapted from HRSA Quick Start User Guides:
<https://hab.hrsa.gov/program-grants-management/careware>

PLEASE NOTE: The client data used in these manuals is purely fictional.

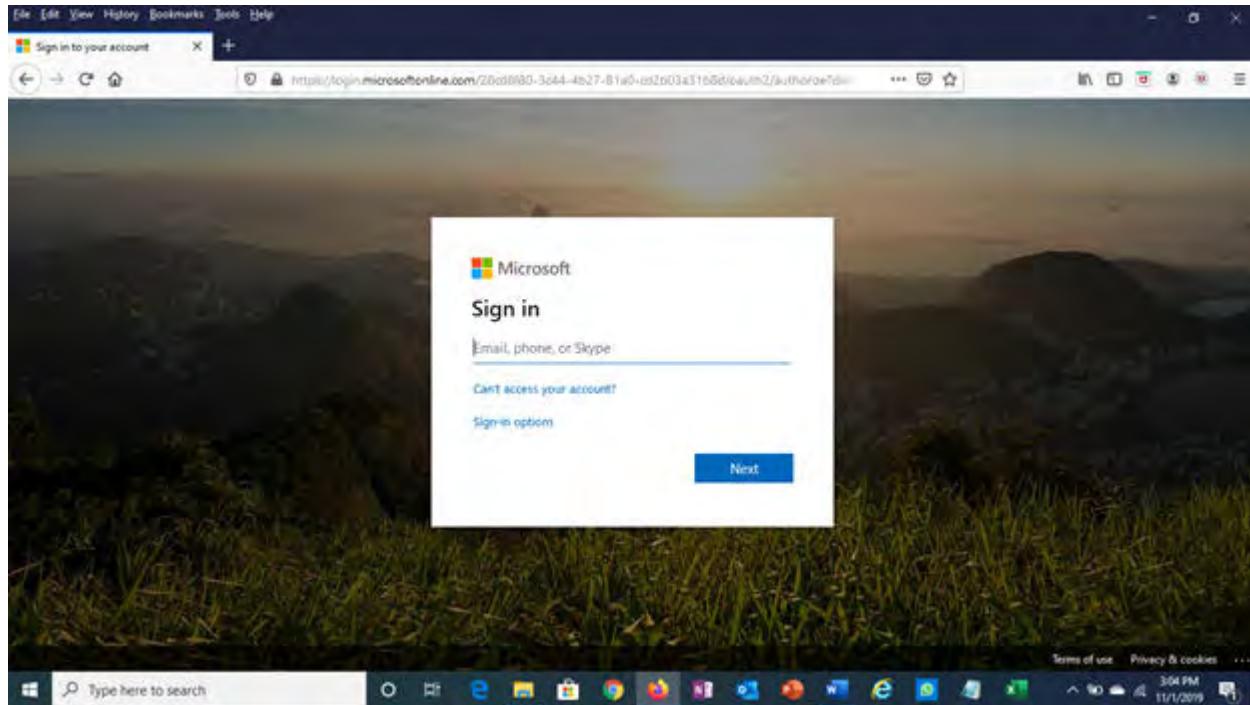
Logging in to CAREWare

1. Open your browser and enter the secure webpage address to connect to your CAREWare system. The CAREWare URL: <https://careware.floridahealth.gov/careware/rs/index.htm>



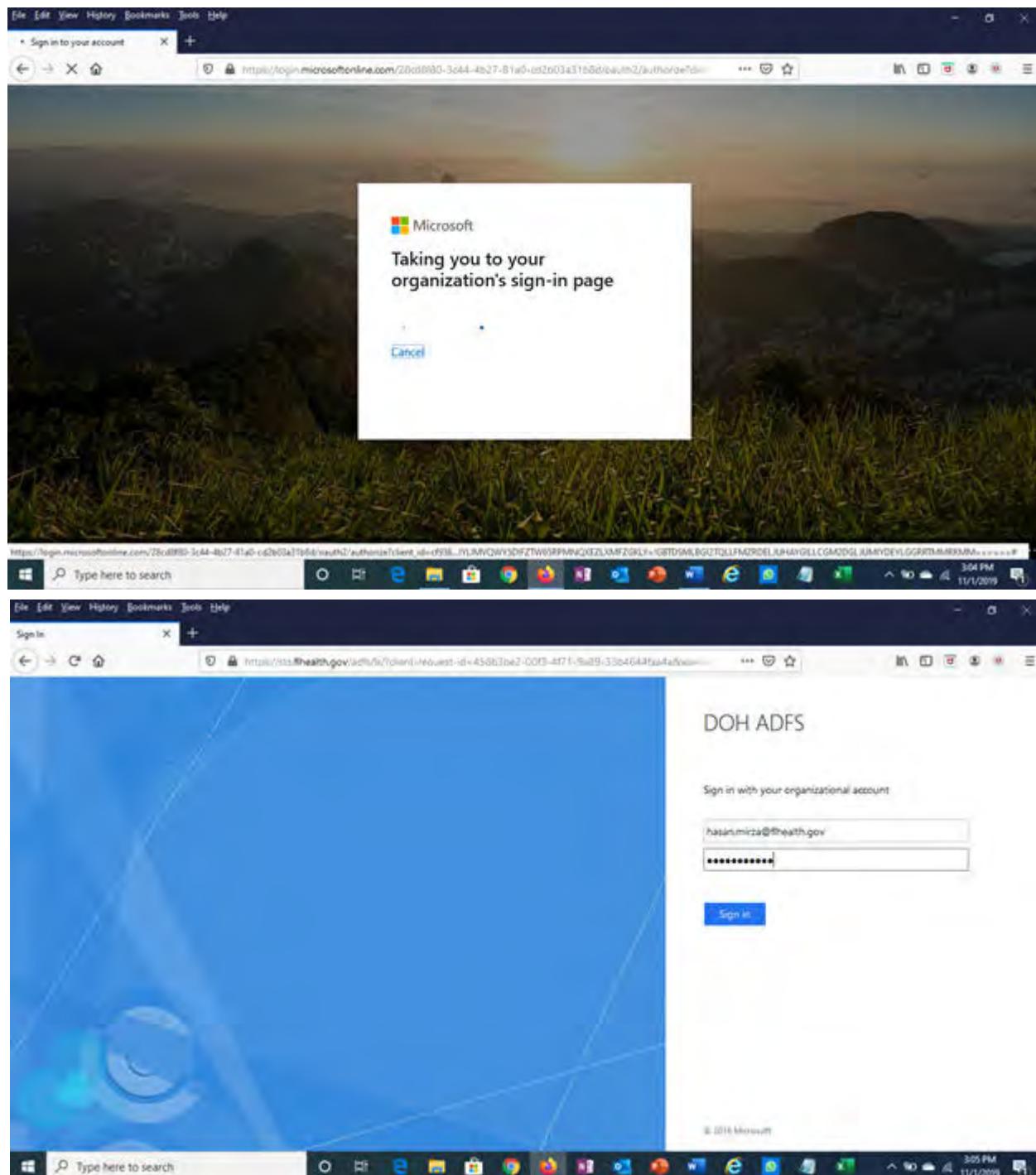
2. Click the AzureAD button to login to the system. Users will then be redirected to the login process below.

- a) Enter your email address.



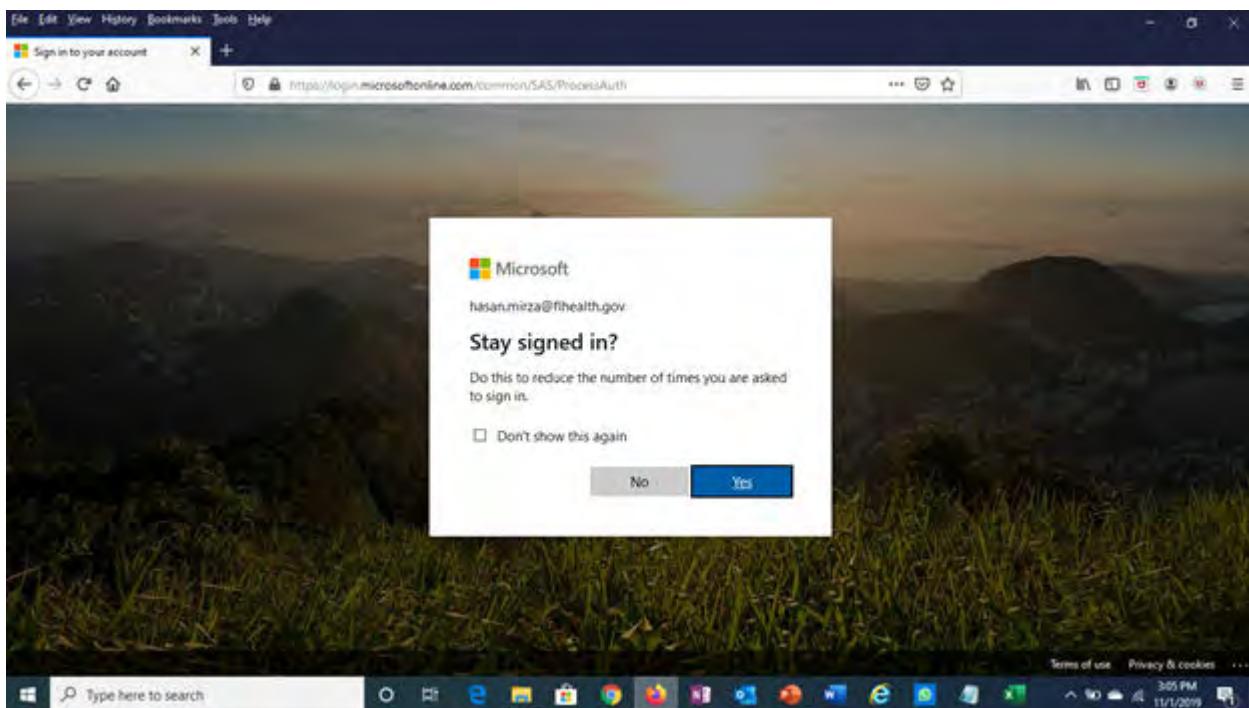
Logging in to CAREWare (continued)

b) After being directed to the DOH ADFS login page, enter your email and password. You will be given the option to stay signed in, which will reduce the number of times you will be asked to sign in.

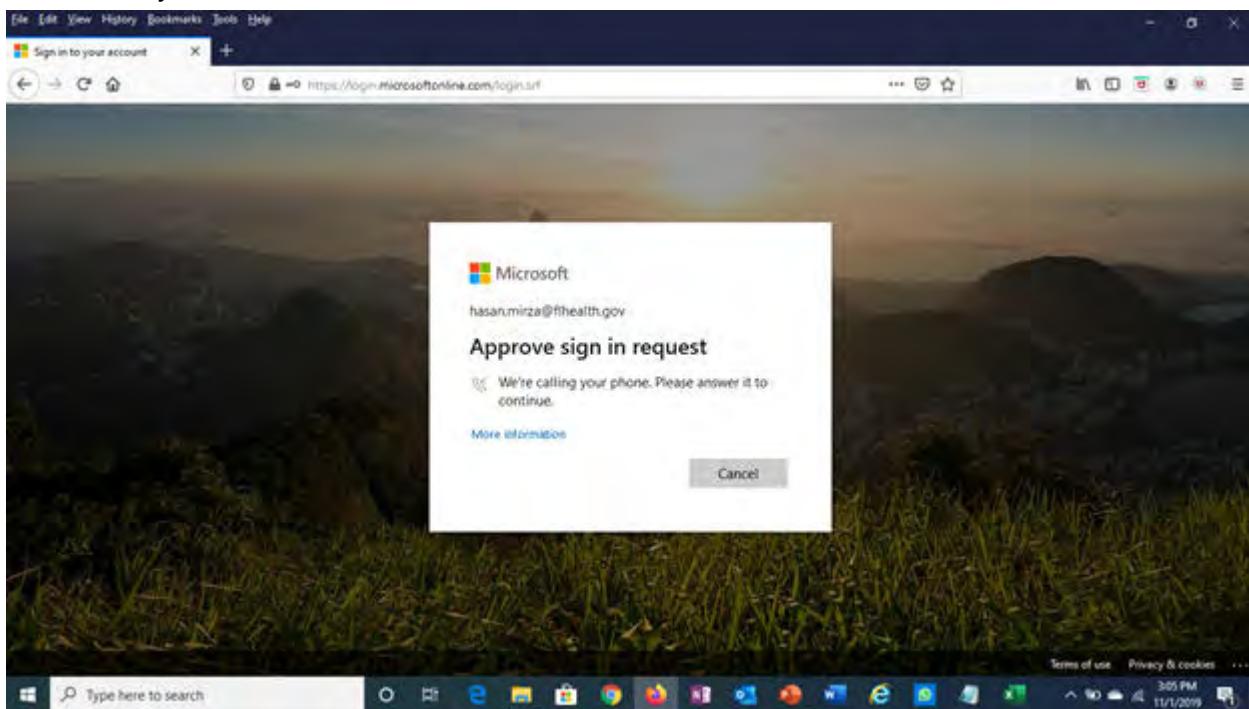


Logging in to CAREWare (continued)

b) You will be given the option to stay signed in; choosing **Yes** will reduce the number of times you will be asked to sign in in the future.



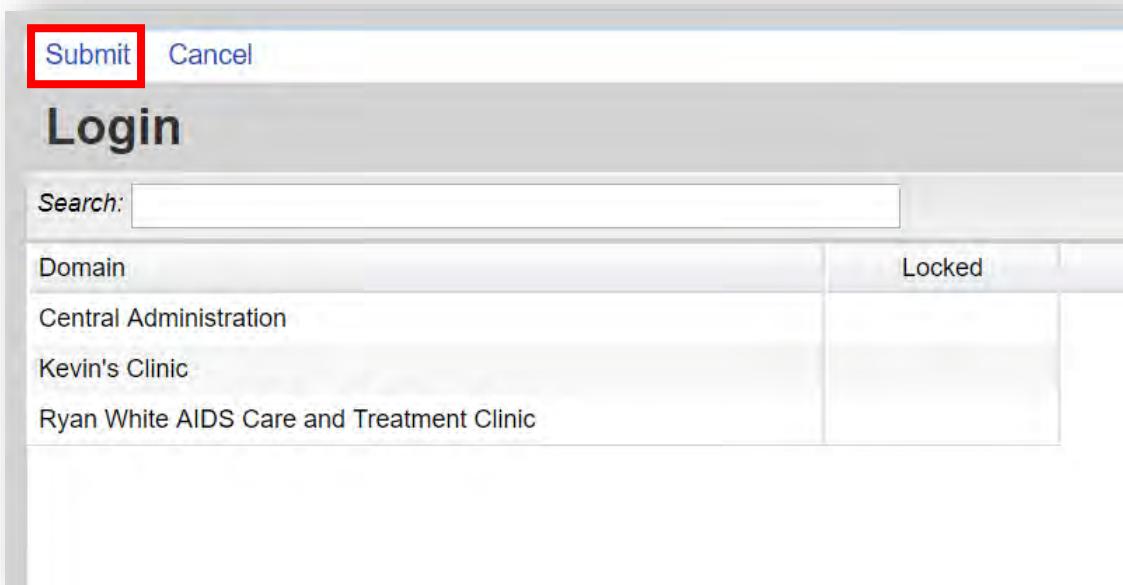
b) Finally, you will be asked to approve your sign-in request via your designated Multi-Factor Authentication (MFA) option. Once the sign-in request has been confirmed you will be directed to the CAREWare 6 homescreen.



Logging in to CAREWare (continued)

3. If you have administrative privileges, you may see a list of several domains. If choosing between Central Administration (“Read-only”) and Provider (“Default” until you change the name), log into a Provider domain.

Select a Provider domain, click **Submit** or double-click on **Domain** name.



The screenshot shows a 'Login' interface. At the top, there are 'Submit' and 'Cancel' buttons. Below that is a 'Search:' input field. A table lists domains with columns for 'Domain' and 'Locked'. The domains listed are 'Central Administration', 'Kevin's Clinic', and 'Ryan White AIDS Care and Treatment Clinic'. The 'Submit' button is highlighted with a red box.

Domain	Locked
Central Administration	
Kevin's Clinic	
Ryan White AIDS Care and Treatment Clinic	

Getting Started

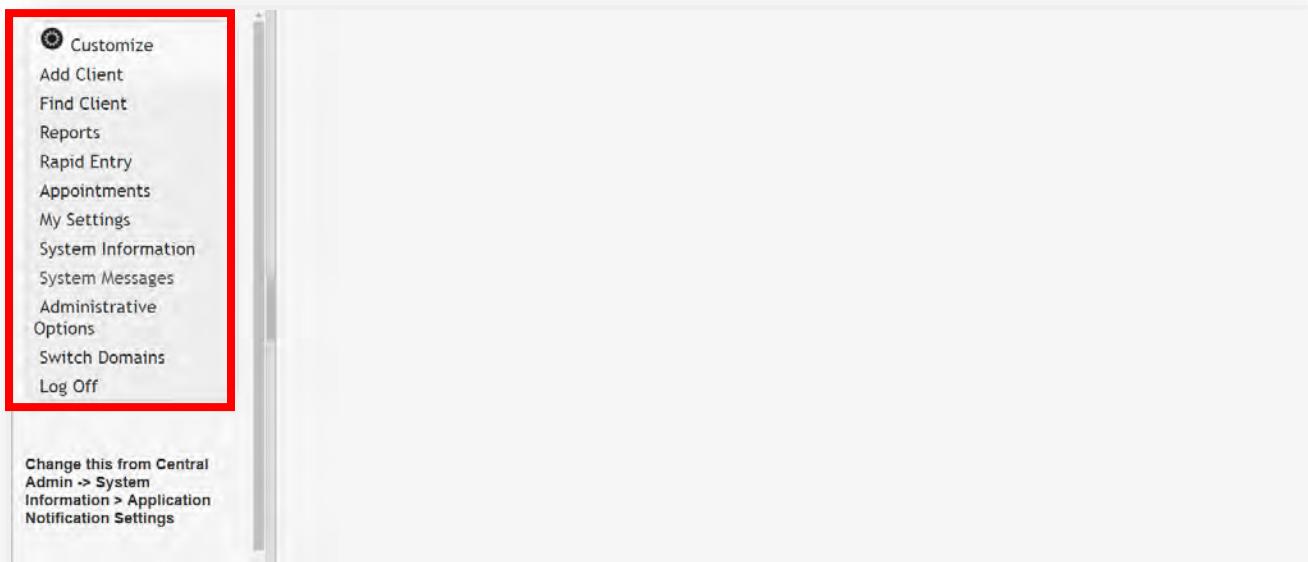
CAREWare Version 6.0 is a design change that performs more like a web application than previous versions of CAREWare. After logging into CAREWare, a **Menu of Links** will be displayed on the left.

Links will list common user tasks in CAREWare. Upon selecting a particular link, the **Link Summary** description will be displayed on the right.

Similar formats, link menus, and descriptions are the same throughout CAREWare Version 6.0!

Menu of Links

Upon logging in to CAREWare, you will find a **Menu of Links** on the left-hand side of the screen. Simply click on the item you wish to access. Clicking **Add Client** or **Find Client** will open a new tab within your browser.



Link Summary

A **Link Summary** is displayed to the right of each link item. In the example below, once Reports is selected from the **Menu of Links**, a new screen appears with additional link items. To the right of each is a **Link Summary**.



Breadcrumbs and Link Actions

Breadcrumbs or **breadcrumb trails** allow users to keep track and maintain awareness of their locations within CAREWare 6.

In this example: **Find Client > Search Results > Demographics** is considered the **Breadcrumb trail**.

Find Client > Search Results > Demographics

Delete Client Back

Demographics

Personal Info Name: Appleseed, Johnny, Gender: Male DOB: 12/05/1965

Change URN JHAP1205651U

Contact Information 123 Main St Apt 2 Anytown, IN 46213

Race/Ethnicity Hispanic (Other), White

HIV Risk Factors MSM AND IDU

If the items in the Breadcrumb trail are blue (as in the example above), click on the item link to return to that section. If they are black, you must either click **Save** or **Cancel** to return to the previous section, as seen below.

Find Client > Search Results > Demographics > Personal Info

Save Cancel

Personal Info

First Name: Johnny

Middle Name:

Last Name: Appleseed

Link Actions are displayed below the Breadcrumb trail and are actions that can be taken on each screen.

CAREWare Reports > Custom Reports > Custom Reports

Manage / Run Add Delete Back Help Print or Export

Custom Reports

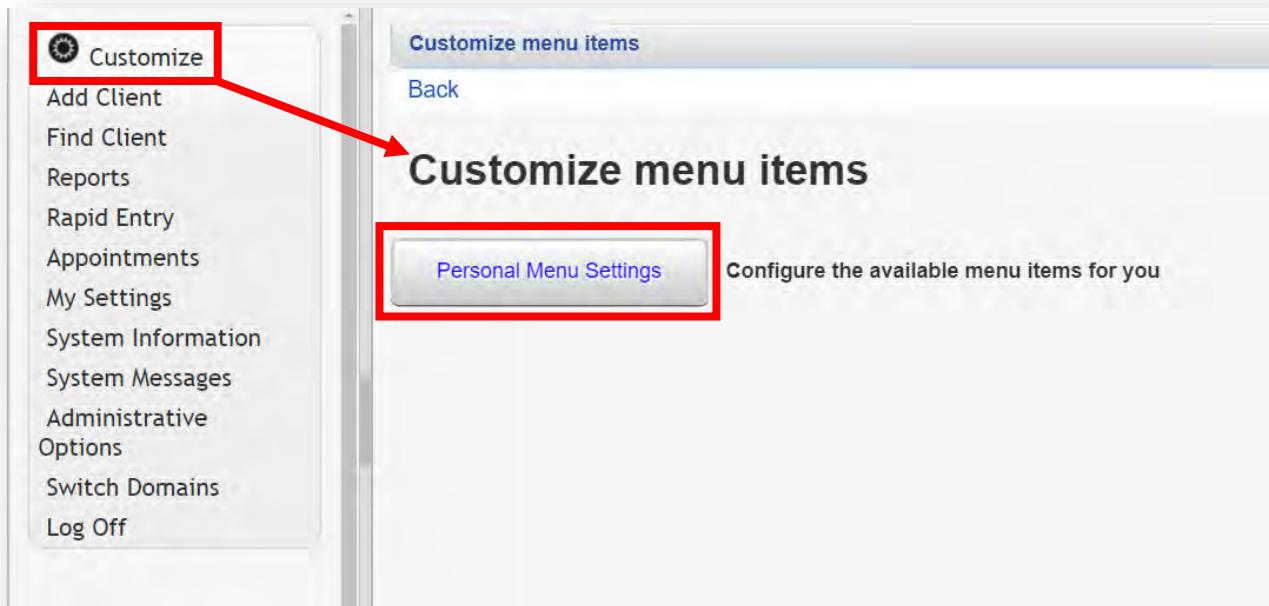


TIP: Using the **Help** option within the **Link Actions** will open a new tab within your browser with more information on the section you are currently in.

Menu Customization

With adequate permissions, the user can personalize and customize the **Menu of Links**.

1. From the **Menu of Links**, select **Customize**. Then, click **Personal Menu Settings**.



2. Show or hide items in the CAREWare Menu of Links by checking or un-checking the box next to the relevant Menu Item. Once complete, click **Save**.

Customize menu items > Personal Menu Settings

Save Back Print or Export

Menu Item Customization

Search:	
Show	Menu Item
<input checked="" type="checkbox"/>	Add Client
<input type="checkbox"/>	Administrative Options
<input checked="" type="checkbox"/>	Appointments
<input type="checkbox"/>	Find Client
<input checked="" type="checkbox"/>	My Settings
<input type="checkbox"/>	Rapid Entry

3. Click on the down arrow at the top of any column to **Hide/Show Columns**.

CAREWare Reports > Custom Reports > Custom Reports

Manage / Run Add Delete Back Help Print or Export

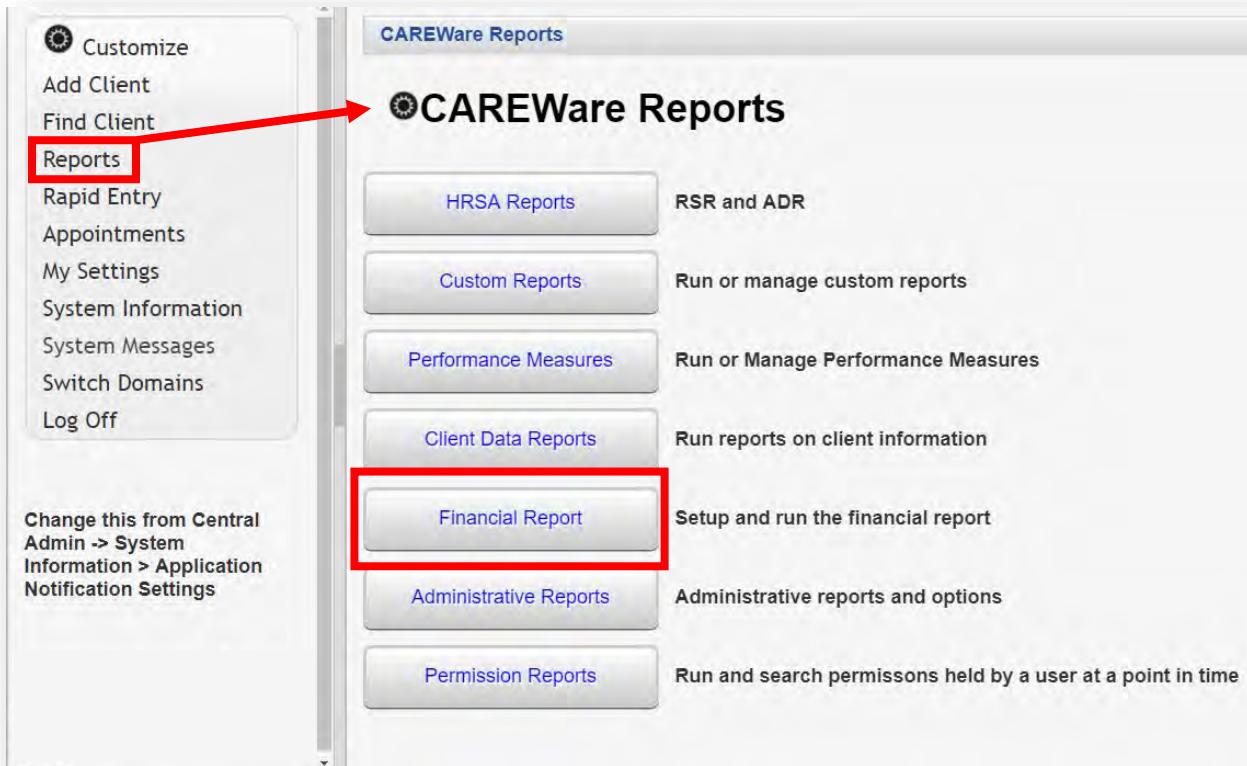
Custom Reports

Name	CrossTab	Report Type	Report Type	Description	Date Created
Death dates		01	Demographics	dates of death	7/16/2007 2:50 PM
First Medical Servic		01	Demographics	1st srvc	7/16/2007 2:50 PM
Sum of Services		01	Demographics	add em up	3/8/2010 2:51 PM
Cap on charges II		01	Demographics		12/31/2018 11:08 AM

4. Click-and-drag the column header to reposition it within the table.

Menu Navigation

1. From the **Menu of Links**, select **Reports** and the CAREWare Reports screen will appear. For this example, click **Financial Report**.



2. You will now be on the Financial Report Settings screen.

- Enter **Begin Date**
- Enter **End Date**
- Click **Run** to open the report in a new tab. Click **PDF** to open the report as a PDF.

CAREWare Reports > Financial Report Settings

Funding Source Filter Edit Filter **Run** **PDF** Help Back

Financial Report Settings

Begin Date:

End Date:

No Funding Source Filter Applied.

Funding Sources:

Include Subservice Detail?:

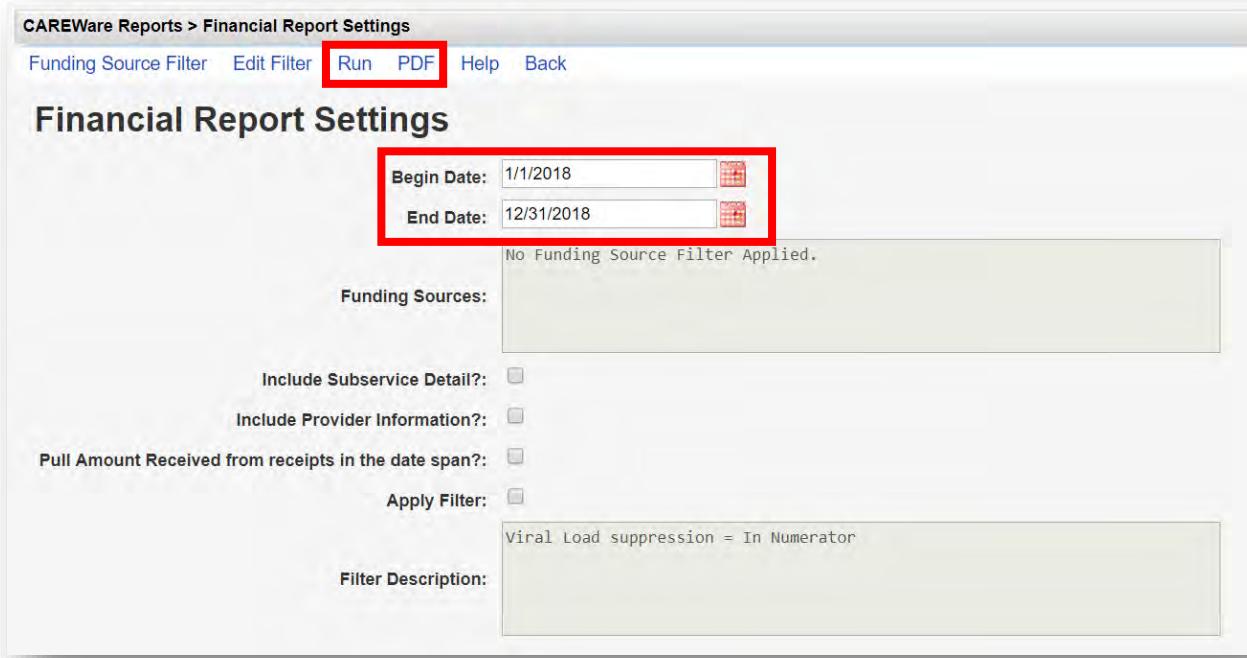
Include Provider Information?:

Pull Amount Received from receipts in the date span?:

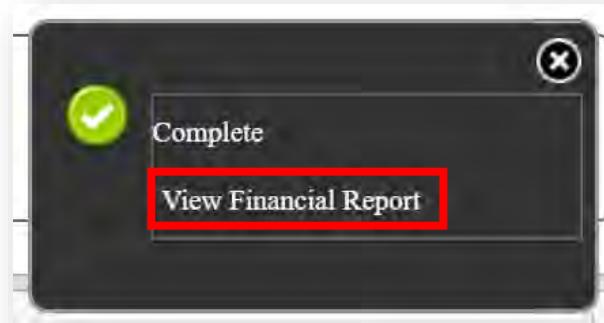
Apply Filter:

Viral Load suppression = In Numerator

Filter Description:



3. Once you click **Run**, a report confirmation message will open in the upper right corner of the screen. Select **View Financial Report**. Your report will be displayed in a new tab.



4. Some screens will have editable fields:

- Fields with a Magnifying-Glass icon  indicate longer lists which are searchable.



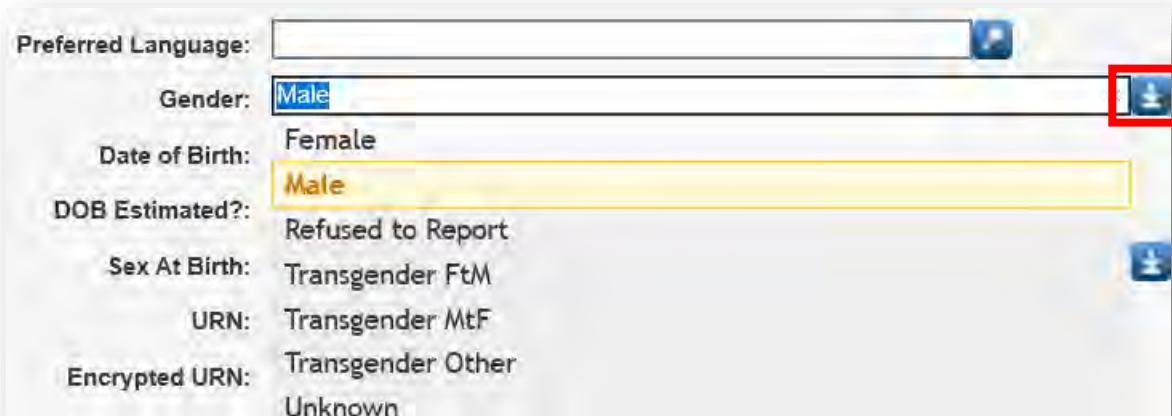
County: 

Zip Code: Clark

Phone: Clay

Clinton

- Fields with a Down-Arrow icon  will display the complete list for ten (10) or fewer choices.



Preferred Language: 

Gender: Male 

Date of Birth: Female

DOB Estimated?: Male

Refused to Report

Sex At Birth: Transgender FtM 

URN: Transgender MtF

Encrypted URN: Transgender Other

Unknown

CAREWare 6



Section 2:

Setting Up Contracts and Services

Adapted from HRSA Quick Start User Guides:
<https://hab.hrsa.gov/program-grants-management/careware>

PLEASE NOTE: The client data used in these manuals is purely fictional.

First Things First

What are contracts?

CAREWare has been set up to mirror the way services are delivered in the real world. For instance, your agency may have a contract to provide Outpatient Ambulatory Health Services (OAHS) services, funded by the Ryan White HIV/AIDS Program (RWHAP) Part B. Under that contract, you may provide a variety of subservices - including lab, medical visit, nurse visit etc. In CAREWare, you'll be setting up your contracts to reflect those subservices.

Remember:

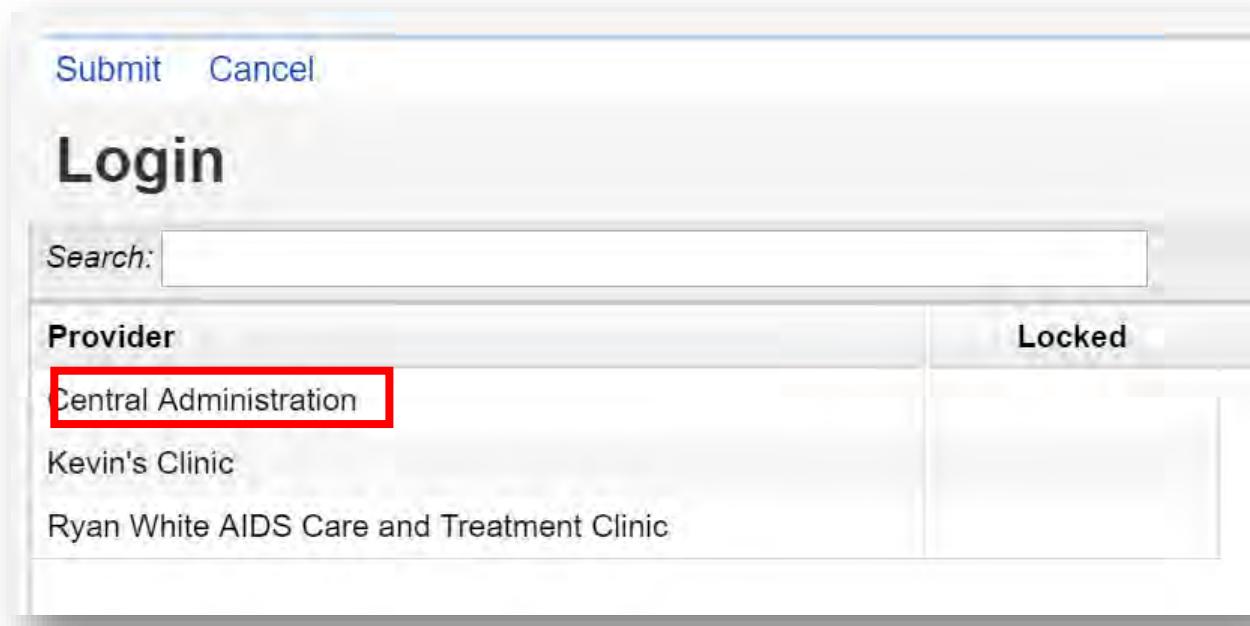
- At least one contract must be set up in CAREWare before you can begin entering services!
- A client needs to have received at least one CARE Act-funded service AND reported as RWHAP Eligible within the reporting period to be included in the RSR report.
- Standardized setup of contracts, services, and subservices in CAREWare is essential to ensure accurate client-level data collection and throughout the reporting year. Proper setup of contracts before you begin data entry helps avoid data inconsistencies in the future.
- Starting in 2019, a new funding source, "Ryan White-related (including program income and pharmacy rebates)" has been added to CAREWare 6 and can now be used.

What do I need to get started?

- You will need to know the funding sources and services provided for each of your agency program contracts to configure them properly in CAREWare.
- If you have multiple providers, it is recommended that contracts be created in the Central Administration domain (and therefore only editable by users with access to Central Administration) for quality control purposes.

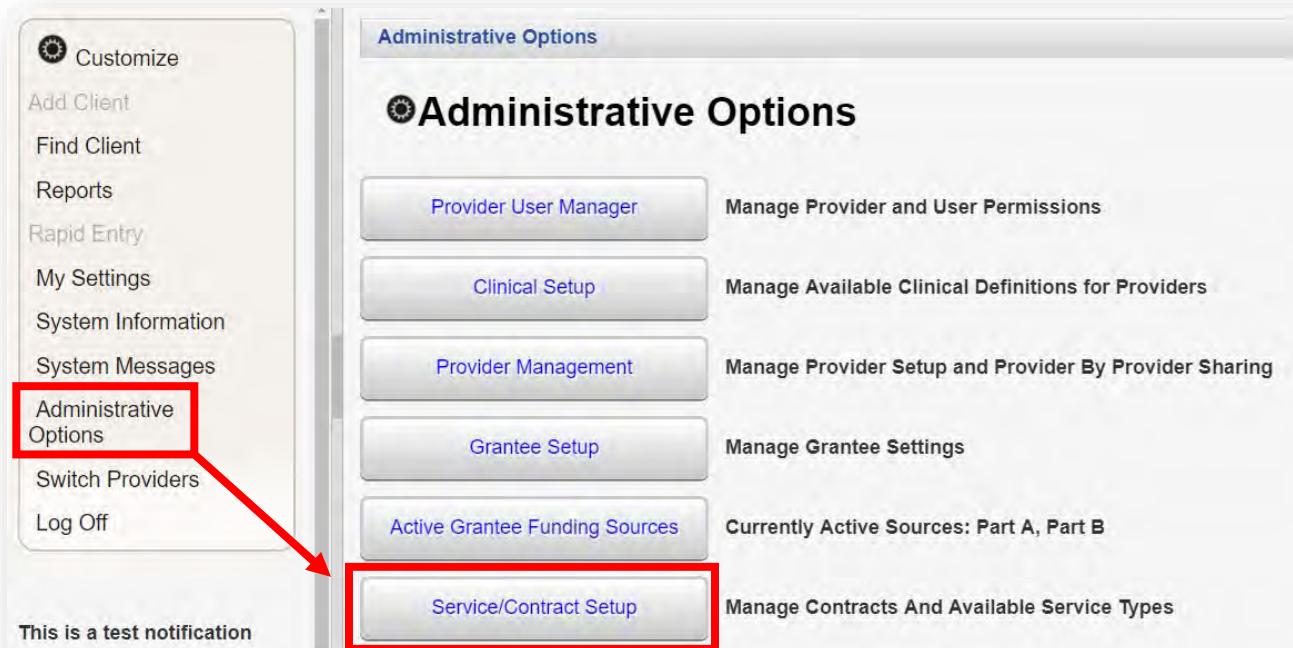
Contract Management

1. Log into CAREWare with sufficient permissions to manage and configure provider contracts, services, and subservices. For security and quality management purposes, we recommend configuring all contracts under the **Central Administration** domain.



Provider	Locked
Central Administration	Locked
Kevin's Clinic	Locked
Ryan White AIDS Care and Treatment Clinic	Locked

2. Select **Administrative Options** from the **Main Menu** and then **Service/Contract Setup** from the **Links** menu.



Administrative Options

Provider User Manager Manage Provider and User Permissions

Clinical Setup Manage Available Clinical Definitions for Providers

Provider Management Manage Provider Setup and Provider By Provider Sharing

Grantee Setup Manage Grantee Settings

Active Grantee Funding Sources Currently Active Sources: Part A, Part B

Service/Contract Setup Manage Contracts And Available Service Types

3. You will now be on the **Service - Contract Setup** menu.

Administrative Options > Service - Contract Setup

Back

Service - Contract Setup

Contract Management	24 Active Contracts, 49 Total Contracts
Subservice Manager	View or edit the list of available subservices
Custom Service Categories Manager	View or edit the available custom service categories
Funding Source Manager	Edit the funding sources available for service contracts
Merge Subservices	Replace a subservice with another subservice
Expiration Notification	Email users in specified permission groups about pending contract expirations

Adding a Contract

1. From the **Service - Contract Setup** menu, select **Contract Management**.

Administrative Options > Service - Contract Setup

Back

Service - Contract Setup

Contract Management 24 Active Contracts, 49 Total Contracts

Subservice Manager View or edit the list of available subservices

Custom Service Categories Manager View or edit the available custom service categories

Funding Source Manager Edit the funding sources available for service contracts

Merge Subservices Replace a subservice with another subservice

Expiration Notification Email users in specified permission groups about pending contract expirations

2. From the **Contract Setup** menu, select **Add**.

Administrative Options > Service - Contract Setup > Contract Management

Manage **Add** Delete Back Print or Export

Contract Setup

Search:

Contract Name	Start Date	Stop Date	Funding	Central?
035 Contract	01/01/1990		Part A, Part D	X
ADAP Insurance	09/12/2005		Part B	
ADAP Insurance Demonstration			Part B	
AIDS			Part A	
CDC GAP Services	01/01/2000		PEPFAR	X

3. Enter in the following information (as applicable).

- **Provider Name**
- **Contract Name**
 - It is recommended to use the CARE Act-funded grant source in the name of your contract(s).
- **Start Date**
- **Stop Date** (optional)

Administrative Options > Service - Contract Setup > Contract Management > Add

Save [Back](#)

Add

Provider Name:	Ryan White AIDS Care and Treatment Clinic
Contract Name:	Part A 19-20
Start Date:	3/1/2019 
Stop Date:	2/29/2020 

If a **Stop Date** is entered, services cannot be entered past this date! You may wish to enter a stop date for quality control purposes or if your contracts and services vary from year-to-year.

4. Scroll down and select the **funding source** for the contract. Once complete, click **Save** (see previous screenshot). You will now return to the **Contract Setup** menu.

Check the funding source(s) for this contract

City of Wassila:

HIV services:

HOPWA:

HOPWA Default:

HOPWA_6425:

MAI:

Manufacturer:

Non Ryan White:

Non Ryan White Funded Outreach:

Not Currently Funded:

Part A:

Part A Louisiana:

Part B:

Part C:

Part D:



NOTE: It is highly recommended that you setup contracts under a single funding source, such as, Part A or Part B or Non-RWHAP. If multiple funding sources are selected for a single contract, separation of services by individual funding sources will not be possible.

5. From the **Contact Setup** menu, click **Service - Contract Setup** within the **Bread Crumb** trail to return to the **Service - Contract Setup** menu.

Administrative Options > **Service - Contract Setup** > Contract Management

Manage Add Delete Back Print or Export

Contract Setup

Search:

Contract Name	Start Date	Stop Date	Funding	Central?
035 Contract	01/01/1990		Part A, Part D	X
ADAP Insurance	09/12/2005		Part B	
ADAP Insurance Demonstration			Part B	
AIDS			Part A	
CDC GAP Services	01/01/2000		PEPFAR	X

Adding Custom Contract Funding Sources

1. From the **Service - Contract Setup** menu, select **Funding Source Manager**.

Administrative Options > Service - Contract Setup

Back

Service - Contract Setup

Contract Management 24 Active Contracts, 49 Total Contracts

Subservice Manager View or edit the list of available subservices

Custom Service Categories Manager View or edit the available custom service categories

Funding Source Manager Edit the funding sources available for service contracts

Merge Subservices Replace a subservice with another subservice

Expiration Notification Email users in specified permission groups about pending contract expirations

2. From the **Funding Source Manager** menu, select **Add**.

Administrative Options > Service - Contract Setup > Funding Source Manager

[View](#) [Edit](#) **Add** [Delete](#) [Back](#) [Print or Export](#)

Funding Source Manager

Search:

Service Category	Care Act Funded	HRSA Defined	Central Only
City of Wassila			
HIV services	X		
HOPWA			
HOPWA Default			
HOPWA_6425			

3. Enter in the following information (as applicable).

- **Funding Source Name**.
- Use the check box to indicate if the funding source is **Care Act Funded**.
- Use the check box to indicate if the funding source is **Central Only**.

Administrative Options > Service - Contract Setup > Funding Source Manager

Save Back

Add

Name:

Care Act Funded:

Central Only:

4. Once complete, click **Save** (see previous screenshot). You will now return to the **Funding Source Manager** menu.

5. From the **Funding Source Manager** menu, click **Service - Contract Setup** within the **Bread Crumb trail** to return to the **Service - Contract Setup** menu.

Administrative Options > **Service - Contract Setup** > Funding Source Manager

View Edit Add Delete Back Print or Export

Funding Source Manager

Search:

Service Category	Care Act Funded	HRSA Defined	Central Only
City of Wassila			
HIV services	X		
HOPWA			
HOPWA Default			
HOPWA_6425			

Adding Contract Items

1. From the **Service - Contract Setup** menu, select **Contract Management**.

Administrative Options > Service - Contract Setup

Back

Service - Contract Setup

Contract Management 24 Active Contracts, 49 Total Contracts

Subservice Manager View or edit the list of available subservices

Custom Service Categories Manager View or edit the available custom service categories

Funding Source Manager Edit the funding sources available for service contracts

Merge Subservices Replace a subservice with another subservice

Expiration Notification Email users in specified permission groups about pending contract expirations

2. From the **Contract Setup** menu, select the relevant contract under the Contract Name column and click **Manage**.

Administrative Options > Service - Contract Setup > Contract Management

Manage Add Delete Back Print or Export

Contract Setup

Search: Part A 19

Contract Name	Start Date	Stop Date	Funding	Central?
035 Contract	01/01/1990		Part A, Part D	X
Primary care	03/01/1999		Part A, Part B, Part C	
Part A 18-19	03/01/2018	02/28/2019	Part A	
Part A 19-20	03/01/2019	02/29/2020	Part A	X

3. From the **Manage** menu, select **Contract Items**.

Administrative Options > Service - Contract Setup > Contract Management > Part A 19-20

Back

Manage

Contract Details Name: Part A 19-20 Start: 03/01/2019 Stop: 02/29/2020 Funding: Part A

Contract Items 3 total Contract Items

Copy Contract Use this contract as a template to create a new contract for another provider or date range

4. From the **Contract Item Setup** menu, click **Add**.

Administrative Options > Service - Contract Setup > Contract Management > Part A 19-20 > Contract Items

View Edit **Add** Delete Subservices Back Print or Export

Contract Item Setup

Search:

Contract Item	Subservices	Budget	Primary Health Care Services	Service Category
Early Intervention Services	1	\$10,000.00		Early Intervention Services
Outpatient/Ambulatory Health Services	2	\$20,000.00	X	Outpatient/Ambulatory Health Services
Medical Case Management	2	\$15,000.00		Medical Case Management

5. Enter in the following information (as applicable).

- **Contract Item**
 - It is recommended that 1) contracts be single-source funded (such as Part A, Part B, Part C, etc.) and 2) contract items mirror HRSA-defined Service Categories, such as Outpatient Ambulatory Health Services (OAHS) and Medical Case Management (MCM).
- **Budget** amount (optional),
 - Can be useful for fee-for-service programs or to designate per-unit costs of subservices to track overall expenditures in CAREWare.
- **Allow data entry past budget** checkbox (optional)
- **Primary Health Care Services** checkbox (optional)
- **Service Category** (recommended)

Administrative Options > Service - Contract Setup > Contract Management > Delete > Part A 19-20 > Contract Items > Add

Save Back

Add

Contract Item:

Budget:

Allow data entry past budget:

Primary Health Care Services:

Service Category: 

6. Once complete, click **Save** (see previous screenshot). You will now return to the **Contract Item Setup** menu.

7. To add a Subservice, select the relevant contract item under the Contract Item column and click **Subservices** from the action bar.

Administrative Options > Service - Contract Setup > Contract Management > Part A 19-20 > Contract Items

View Edit Add Delete **Subservices** Back Print or Export

Contract Item Setup

Search:

Contract Item	Subservices	Budget	Primary Health Care Services	Service Category
Early Intervention Services	1	\$10,000.00		Early Intervention Services
Outpatient/Ambulatory Health Services	2	\$20,000.00	X	Outpatient/Ambulatory Health Services
Medical Case Management	2	\$15,000.00		Medical Case Management

8. From the **Contract Subservice Setup** menu, click **Add**.

Administrative Options > Service - Contract Setup > Contract Management > Part A 19-20 > Contract Items > Subservices
View Edit **Add** Delete Set Dependencies Back Print or Export

Contract Subservice Setup

Search: <input type="text"/>					
Subservice	Service Category	Qty	Price	Active?	Dependency Rules
EIS Outreach	Early Intervention Services	1	\$0.00	X	0 dependency rules

9. Enter in the following information (as applicable).

- **Subservice**
 - The **Subservice** box can be used to search for available subservices.
- **Qty** (quantity)
 - Default is “1” (recommended).
 - For agencies that provide Medical Case Management services—including, intake, assessment, face-to-face, and non face-to-face, etc.— one unit of “case management” could represent a unit of time, such as 15 or 30 minute increments. For example, if a client assessment took 2 hours to complete by the case manager, it may be represented in CAREWare as entering 8 units of service (if each unit of service equals 15 minutes).
- **Price** (optional)
 - If tracking expenditures, a unit cost (price) can be entered or remain at the default value of “0.”

Administrative Options > Service - Contract Setup > Contract Management > Part A 19-20 > Contract Items > Subservices > Add
Save Back

Add

Subservice: 

Qty:

Price:

10. Once complete, click **Save** (see previous screenshot). You will now return to the **Contract Subservice Setup** menu.



NOTE: In a new CAREWare installation, there are no pre-loaded subservices. To create new subservices or make changes to the available subservices, follow the instructions below.

Managing Subservices

1. From the Service - Contract Setup menu, select **Subservice Manager**.

Administrative Options > Service - Contract Setup

Back

Service - Contract Setup

Contract Management 24 Active Contracts. 49 Total Contracts

Subservice Manager View or edit the list of available subservices

Custom Service Categories Manager View or edit the available custom service categories

Funding Source Manager Edit the funding sources available for service contracts

Merge Subservices Replace a subservice with another subservice

Expiration Notification Email users in specified permission groups about pending contract expirations

2. From the **Subservice Manager** menu, select **Add**.

Administrative Options > Service - Contract Setup > Subservice Manager

View Edit **Add** Delete Set Tags View Contracts Back Print or Export

Subservice Manager

Search:

Service Category	Short Name	Long Name	Under Contract?
ADAP Insurance	Other health insur	Other health insur	X
ADAP Insurance	Other health insur	Other health insur	X
ADAP Insurance	Other health insur	Other health insur	X
ADAP Insurance	Other health insur	Other health insur	X
AIDS Pharmaceutical Assistance	Local APA	Local APA	X

To add a subservice, you'll need to specify the **Service Category** (also known as the service). The Category is a HRSA-defined Service Category and matches the RSR report.

- **Create a Short Name**
 - This is the subservice name which will be displayed in the drop-down menu during service data entry.
- **Create a Long Name**

It is recommended to use clear, easily understood subservice names, perhaps beginning each with service category abbreviations. Please note, it is very important to ensure consistent subservice names across contracts.

Administrative Options > Service - Contract Setup > Subservice Manager

Save Back

Add

Service Category:

Short Name:

Long Name:

3. Once complete, click **Save** (see previous screenshot). You will now return to the **Subservice Manager** menu.

Repeat these steps as necessary to complete all other contracts, service categories, and subservices. Here is a sample of a RWHAP Part A contract with three contract items.

Administrative Options > Service - Contract Setup > Contract Setup > Part A 19-20 > Contract Item Setup

View Edit Add Delete Subservices Back Print or Export

Contract Item Setup

Search:

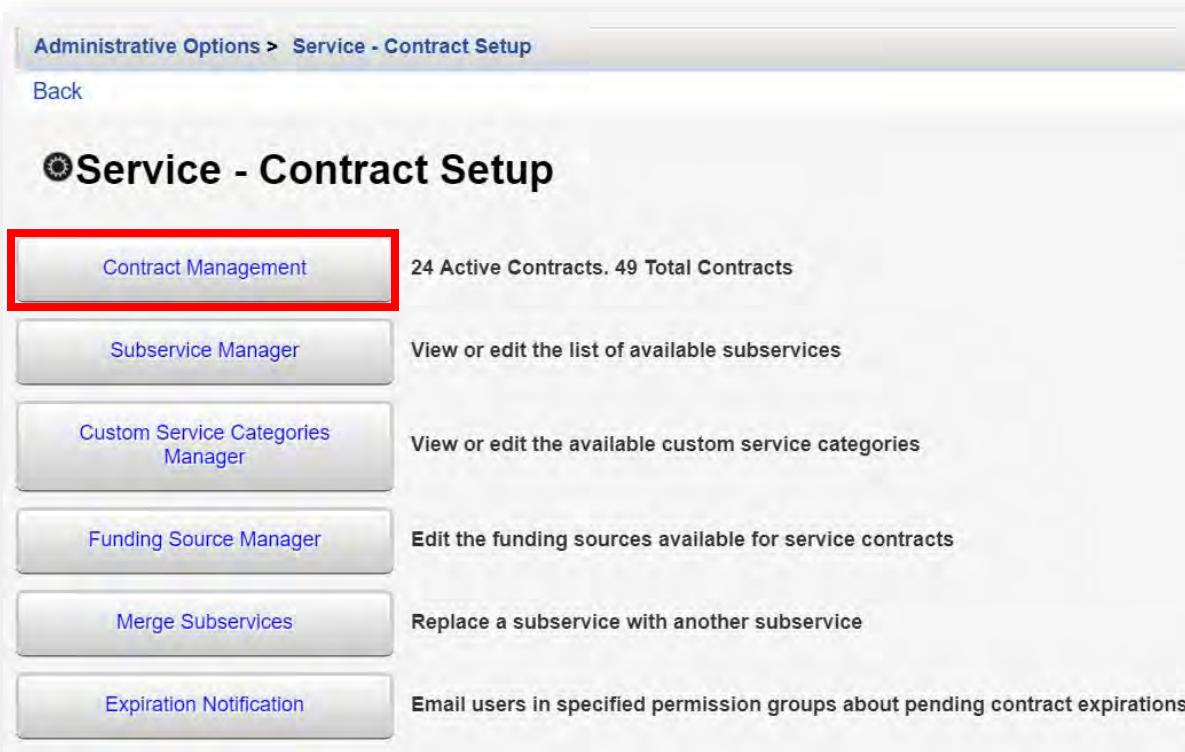
Contract Item	Subservices	Budget	Allow data entry past budget	Primary Health Care Services	Service Category
Early Intervention Services	1	\$10,000.00			Early Intervention Services
Medical Case Management	2	\$15,000.00			Medical Case Management
Outpatient/Ambulatory Health Services	2	\$20,000.00		X	Outpatient/Ambulatory Health

Copying Contracts

For programs where agency contracts differ widely from year-to-year, the “Copy Contract” feature can be very useful. Note, that many contracts may stay the same from year to year or change only slightly. These contracts don’t need to be copied.

To assist in the management of contracts from year to year, provider contracts can be copied in CAREWare, including funding source, contract items, and subservices. The **Copy Contract** feature is only available under the Central Administration domain.

1. From the **Service - Contract Setup** menu, select **Contract Management**.



Administrative Options > Service - Contract Setup

Back

Service - Contract Setup

Contract Management 24 Active Contracts. 49 Total Contracts

Subservice Manager View or edit the list of available subservices

Custom Service Categories Manager View or edit the available custom service categories

Funding Source Manager Edit the funding sources available for service contracts

Merge Subservices Replace a subservice with another subservice

Expiration Notification Email users in specified permission groups about pending contract expirations

4. From the **Contract Setup** menu, select the desired contract to copy under the Contract Name column and click **Manage**.

Administrative Options > Service - Contract Setup > Contract Setup

Manage Add Delete Back Print or Export

Contract Setup

Search: Part B 2018-2019

Contract Name	Start Date	Stop Date	Funding	Central?
Part B 2018-2019	03/01/2018	02/28/2019	Part B	X

5. From the **Manage** menu, select **Copy Contract**.

Administrative Options > Service - Contract Setup > Contract Management > Part B 2018-2019

Back

Manage

Contract Details Name: Part B 2018-2019 Start: 03/01/2018 Stop: 02/28/2019 Funding: Part B

Contract Items 0 total Contract Items

Copy Contract Use this contract as a template to create a new contract for another provider or date range

6. Source Contract Name, Source Contract Start Date, and Source Contract Stop Date will be prepopulated. Enter in the following information (as applicable).

- **New Contract Provider** (can be the same provider or a different provider)
- **New Contract Name** (must be different from existing contract name)
- **New Contract Start Date**
- **New Contract Stop Date**
- **Grace Period Days**

Administrative Options > Service - Contract Setup > Contract Management > Part B 2018-2019 > Part B 2018-2019

Save [Back](#)

Part B 2018-2019

Source Contract Name:	Part B 2018-2019
Source Contract Start Date:	03/01/2018
Source Contract Stop Date:	02/28/2019
New Contract Provider:	<input type="text"/>
New Contract Name:	Part B 2019-2020
New Contract Start Date:	3/1/2019 
New Contract Stop Date:	2/29/2020 
Grace Period Days:	<input type="text"/>

7. Once complete, click **Save** (see previous screenshot). You will now return to the **Manage** menu.

CAREWare 6



Section 3:

**Adding Clients, Demographics,
Services, and Annual Review Data**

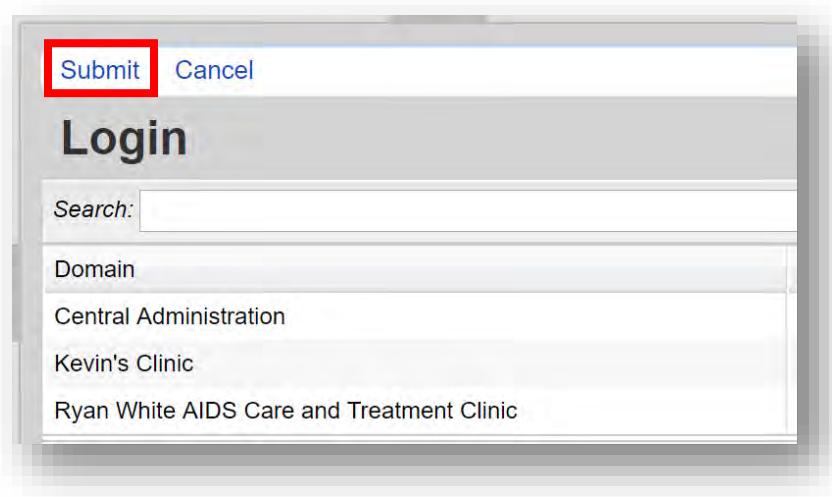
Adapted from HRSA Quick Start User Guides:
<https://hab.hrsa.gov/program-grants-management/careware>

PLEASE NOTE: The client data used in these manuals is purely fictional.

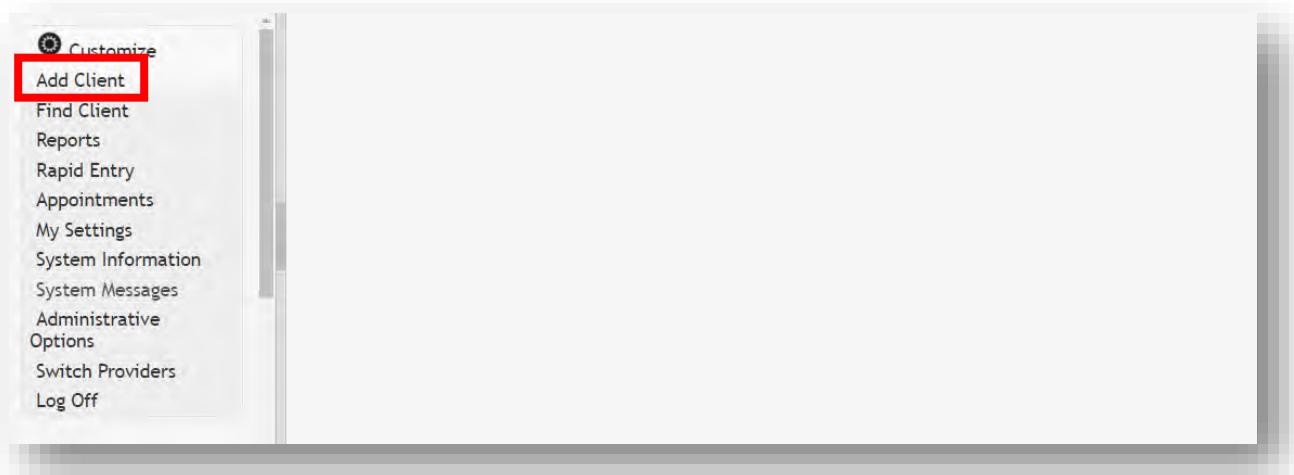
Adding Clients

1. Log in to CAREWare. If you have administrative privileges, you may see a list of several domains. If choosing between Central Administration ("Read-only") and Provider ("Default" until you change the name), log into a Provider domain.

Select a Provider domain, click **Submit** or double-click **Domain** name.



2. Select **Add Client** from the main menu and a new tab will open in your browser.



3. Enter the Last Name, First Name, Gender, and Date of Birth of the client. All fields are required, except Middle Name and the DOB Estimated checkbox (which is not advised to be used).

Add

Last Name:

First Name:

Middle Name:

Gender: 

Date of Birth: 

DOB Estimated?:



NOTE: This step is the number one source of duplicate clients and data entry errors in CAREWare. Please double check your entries here carefully before clicking the "Add Client" button!

Users should develop business rules/operating procedures outlining the method by which client names should be collected and recorded. For example:

- Enter the client's entire name as it normally appears on documentation such as a driver's license, birth certificate, passport, or Social Security card.
- Avoid using nicknames (e.g., do not use Becca if the client's first name is Rebecca).
- Avoid using initials

4. Click **Add**. If there are any invalid field formats, an alert message will appear.

The screenshot shows a client addition form with the following fields and values:

- Last Name: Appleseed
- First Name: Johnny
- Middle Name: (empty)
- Gender: Male
- Date of Birth: 12/5/65
- DOB Estimated?:

A red box highlights the "Date of Birth" field, and a red callout bubble to its right displays the validation error: "Date not valid for format: m/d/yyyy".

Possible Duplicate Clients

There are several scenarios where you may get a “duplicate client” message. The most common is when the client has already been entered into the system; however sometimes clients with common names may have the same birthday, so further research is needed before you proceed.

1. In the event of a conflict, after you click **Add**, you will see the message stating “The client you are adding is a possible duplicate. Resolve the duplicate URNs (Unique Record Numbers) if it is a new client.”
2. Select the client from the list and select **View More Information** to review additional client information.

The screenshot shows a message box with the following content:

View More Information **Cancel** **Print or Export**

**The client you are adding is a possible duplicate.
Resolve the duplicate URNs if it is a new client.**

Search:

Last Name	First Name	Client URN
Appleseed	Johnny	JHAP1205651U

3. Compare client information to determine if this is the same client.

4. If it is the same person, click **This is the same client**. The existing client record will be displayed. If it's a new client, click **This is a new client**. Doing so will create a new client record. If the client matches multiple clients in the database, click **Back** and repeat step #2.

Add Client > Client Resolution > View More Information

[This is the same client](#) [This is a new client](#) [Back](#)

View More Information

First Name:	Johnny
Middle Name:	
Last Name:	Appleseed
Date of Birth:	12/5/1965
Gender:	Male

Entering Demographic Information

1. After you have created the client, the main Demographics screen will appear. Current client demographic values will be previewed in the Link Summary next to each section.

2. From the main Demographics screen, you can view and edit various demographic information, such as **Personal Info**, **Race/Ethnicity**, **HIV Risk Factors**, and **HIV Status**. To view/edit any of this information, click the blue link of the category you wish to view/edit. For example, to edit a client's contact information, click **Contact Information**.



The screenshot shows the 'Demographics' screen for a client named Appleseed, Johnny. The 'Contact Information' button is highlighted with a red box. Other buttons include 'Personal Info', 'Change URN', 'Race/Ethnicity', 'HIV Risk Factors', 'Vital Enrollment Status', 'Eligibility', and 'HIV Status'. The 'Contact Information' button is linked to the address 123 Main St Apt 2, Anytown, IN 46213.

Category	Information
Personal Info	Name: Appleseed, Johnny, Gender: Male DOB: 12/05/1965
Change URN	JHAP1205651U
Contact Information	123 Main St Apt 2 Anytown, IN 46213
Race/Ethnicity	Hispanic (Other), White
HIV Risk Factors	MSM AND IDU
Vital Enrollment Status	Vital Status: Alive Current Status: Active
Eligibility	Not Eligible for Ryan White
HIV Status	HIV-positive (not AIDS) HIV Date: 01/01/2007

 If you are in a network and a client was previously entered by another clinic, you are still able to edit demographics with adequate permissions. CAREWare considers last updated data to be the most reliable.

3. The Contact Information screen now appears. Once all relevant information has been entered, click **Save**.

Add Client > Client Resolution > Add Client > Demographics > Contact Information

Save **Cancel**

Contact Information

Address: 111 5th Ave.

City: Washington

State: District of Columbia

County: Washington

Zip Code: 22222

Phone: 555-555-5555

Include in mailing label reports?:



TIP: Keep in mind that updated client demographics will assist other agencies on the network and many client demographic fields are required to be reported on the RSR.

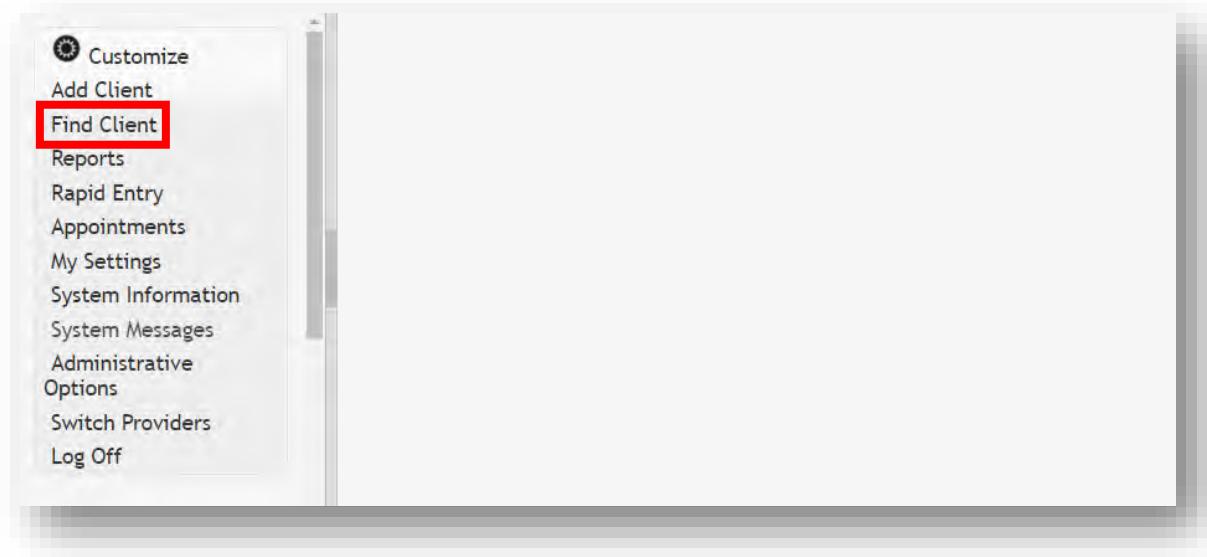
Entering Service Utilization

If you are entering a new client, you will be in the client screen already; skip to step 4. If you are entering services for an existing client, perform the following actions.

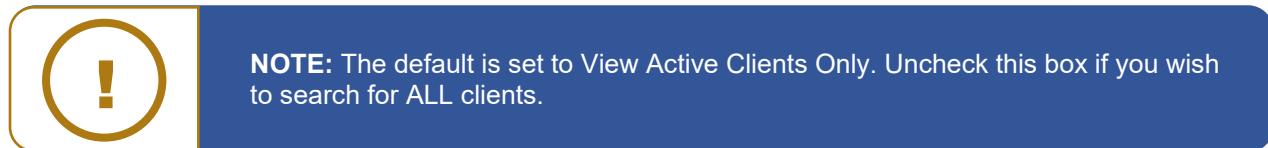


NOTE: You can't enter services until you've set up your contracts. Please see the Quick Start guide, "Setting up Contracts and Subservices" for more information.

1. Log into CAREWare and select **Find Client** from the main menu on the left side of the screen.



2. Search by any of the available fields; in this case we'll use the last name. Click **Client Search**.

A screenshot of the 'Find Client' search interface. The title bar says 'Find Client' and 'Client Search' (which is highlighted with a red box). The main area is titled 'Find Client' and contains the following fields: 'Last Name' with the value 'Appleseed' in a blue input field, 'First Name' (empty), 'ClientID' (empty), 'URNorEURN' (empty), 'Encrypted UCI' (empty), 'Active Only' with a checked checkbox, and 'Ethnicity' with a dropdown menu open. The background is white, and the text is in a black sans-serif font.

3. A list of matches to your search appears. Select the correct name from the list and click **View Details**.

The screenshot shows a 'Search Results' page with a table of client data. The table has columns for Last Name, First Name, Client ID, URN, EURN, Encrypted UCI, and Match Type. Three clients are listed, all with 'Appleseed' in the last name column. The first two clients have 'John' and 'Johnny' in the first name column respectively, while the third has 'Martha'. The 'Match Type' column for all three clients shows 'Exact'.

Last Name	First Name	Client ID	URN	EURN	Encrypted UCI	Match Type
Appleseed	John		JHAP0105851U	XqYSZJ4bl	ECA88A4A1FE658	Exact
Appleseed	Johnny	EMR123	JHAP1205651U	T+oN+bl1n	8A30545F3C06276	Exact
Appleseed	Martha		MRAP0507784U	HN+keK2Qa	1A6A4DF54CAB24I	Exact

4. After clicking **View Details**, the **Demographics** screen will appear. Click **Services** from the Menu of Links.

The screenshot shows the 'Demographics' page for a client named 'Appleseed, Johnny'. The left sidebar has a 'Menu of Links' with various options like 'Customize', 'Demographics', 'Client Report', 'Encounter Report', 'Services' (which is highlighted with a red box), 'Annual Review', 'Case Notes', 'Custom Forms', 'Vital Signs', 'Hospital Admissions', 'Medications', 'Labs', 'Screenings', 'Screening Labs', 'Immunizations', 'Diagnoses', 'Sharing Requests', 'Referrals', 'Relations', and 'Counseling and Testing'. The main content area displays demographic information in boxes: 'Personal Info' (Name: Appleseed, Johnny, Gender: Male DOB: 12/05/1965), 'Change URN' (JHAP1205651U), 'Contact Information' (123 Main St Apt 2 Anytown, IN 46213), 'Race/Ethnicity' (Hispanic (Other), White), 'HIV Risk Factors' (MSM AND IDU), 'Vital Enrollment Status' (Vital Status: Alive Current Status: Active), 'Eligibility' (Ryan White Eligible), 'HIV Status' (HIV-positive (not AIDS) HIV Date: 01/01/2007), and 'Provider Notes' (No description supplied).

5. The Services screen will now be displayed. Click **Add**.

Date	Subservice	Contract	Units
02/05/2019	EIS Outreach	Part A 18-19	1
02/01/2019	MCM Face-to-face	Part A 18-19	6
01/30/2019	MCM Non Face-to-f	Part A 18-19	2

6. Select **Service Name** from the Subservice drop-down list, previously setup in CAREWare for each funded provider. Select the desired service and click **Next**.

Find Client > Search Results > Demographics > Services > Add Service

Next Back

Add Service

Client: Johnny Appleseed

Date: 3/6/2019

Service Name:



NOTE: Only services under active contracts will be listed!

If you are looking for a service that you know is in the system but does not appear on your dropdown list, the contract may have reached its end date, or you may not have added that subservice to this specific contract. See the Quick Start Guide, "Creating Contracts and Services" for further information.

7. Enter the **Contract** for this service, and any other necessary information, such as **Units**, **Price**, and **Total**. Once complete, click **Save**.

Find Client > Search Results > Demographics > Services > Add Service > Add Service

Save Back

Next

Client:	Johnny Appleseed
Date:	3/6/2019 <input type="button" value="Calendar"/>
Service Name:	EIS Outreach
Contract:	Part A 19-20 <input type="button" value="Download"/>
Units:	1
Price:	0.00 \$
Total:	0.00 \$

Entering Annual Review Information

Annually, CAREWare users are required to review and update two annual review fields and one screening for all RWHAP eligible clients. These fields are:

- Housing Arrangement (found within the Annual Screenings tab)
- Insurance Assessments
- Poverty Level Assessments

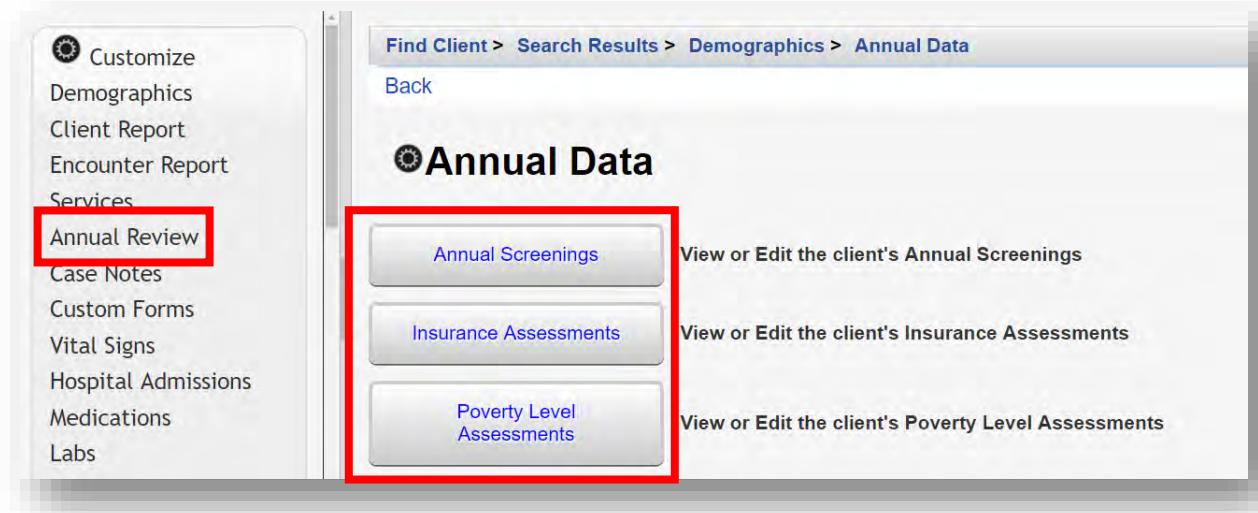
These three fields are RSR-required data elements for clients that received **ANY** service in the reporting year.

There are also three additional annual screenings (as of the 2019 RSR, these screenings are **no longer** RSR-required data elements):

- HIV Risk Reduction Counseling
- Mental Health
- Substance Abuse

To enter the annual review data:

1. Select **Annual Review** from the menu on the left side of the screen. Select either **Annual Screenings**, **Insurance Assessments**, or **Poverty Level Assessments**.



Find Client > Search Results > Demographics > Annual Data

Back

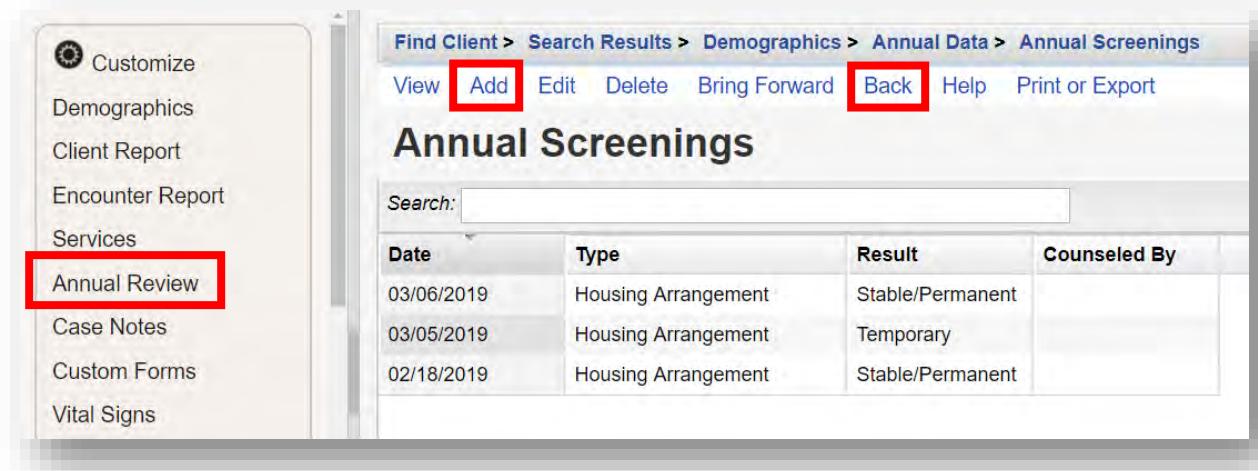
Annual Data

Annual Screenings View or Edit the client's Annual Screenings

Insurance Assessments View or Edit the client's Insurance Assessments

Poverty Level Assessments View or Edit the client's Poverty Level Assessments

2. On the next page, click **Add**.



Find Client > Search Results > Demographics > Annual Data > Annual Screenings

View Add Edit Delete Bring Forward Back Help Print or Export

Annual Screenings

Date	Type	Result	Counseled By
03/06/2019	Housing Arrangement	Stable/Permanent	
03/05/2019	Housing Arrangement	Temporary	
02/18/2019	Housing Arrangement	Stable/Permanent	

3. To navigate back to the Annual Data menu, click **Back** or **Annual Review** on the left side of the screen (see previous screenshot).

Annual Screenings

1. Enter **Date** and select **Type**, **Result**, and **C counseled By** (if applicable) from the drop-down lists. Once all information is entered, click **Save**.

Find Client > Search Results > Demographics > Annual Data > Annual Screenings > Add

Save Cancel

Add

Date: 

Type: 

Result:

Counseled By:

The following **Types** are available in the drop-down list. Refer to the guidance below regarding the **Result** field:

- **HIV Risk Reduction Counseling** – If the counseling has been provided, select the appropriate authorized counselor who performed it.
- **Housing Arrangement** - Please refer to HRSA guidelines to determine the difference between stable/permanent, temporary, and unstable.
- **Mental Health** – Select Yes, No, or Not Medically Indicated, if applicable.
- **Substance Abuse** – Select Yes, No, or Not Medically Indicated, if applicable.
- **HIV Primary Care** – Enter the location where the client receives their primary HIV medical care.



Insurance Assessments

1. Enter **Insurance Assessment Date**, then select the client's **Primary Insurance** from the drop-down list. Once the value is selected from the drop-down list for primary insurance, the value will automatically be checked in the list below.
2. Select secondary insurance/other insurance using the checkboxes, as applicable. Click **Save**.

Find Client > Search Results > Demographics > Annual Data > Insurance Assessments > Add

Save **Cancel**

Add

Insurance Assessment Date: 

Primary Insurance: 

Private Individual:

Private Employer:

Medicare Part A/B:

Medicare Part D:

Full LIS:

Medicare (Part unspecified):

Medicaid:

VA, Other Military:

IHS:

Other Public:

Other:

Other Insurance Specify:

High Risk Insurance Pool:

Insurer:

Poverty Level Assessments

1. Enter **Date**, **Household Size**, and **Household Income**. Note: Entry of **Individual Income** is optional. It is used in the *Cap on Charges* feature. Click **Save**.

Find Client > Search Results > Demographics > Annual Data > Poverty Level Assessments > Add

Save [Cancel](#)

Add

Date: 

Household Size:

Household Income: \$

Individual Income: \$

 **NOTE:** The Federal Poverty Level (FPL) will be calculated automatically based on Household Size and Household Income values. Figures to calculate the FPL are updated in the first quarter of each year. This will require administrators to upgrade when it becomes available, typically in mid-February or March.

CAREWare 6



Section 4:

Customizing Tabs and Fields

Adapted from HRSA Quick Start User Guides:
<https://hab.hrsa.gov/program-grants-management/careware>

PLEASE NOTE: The client data used in these manuals is purely fictional.

First Things First

Getting Started

You should have at least one client entered in the system so you can see how your custom tabs and fields will look.

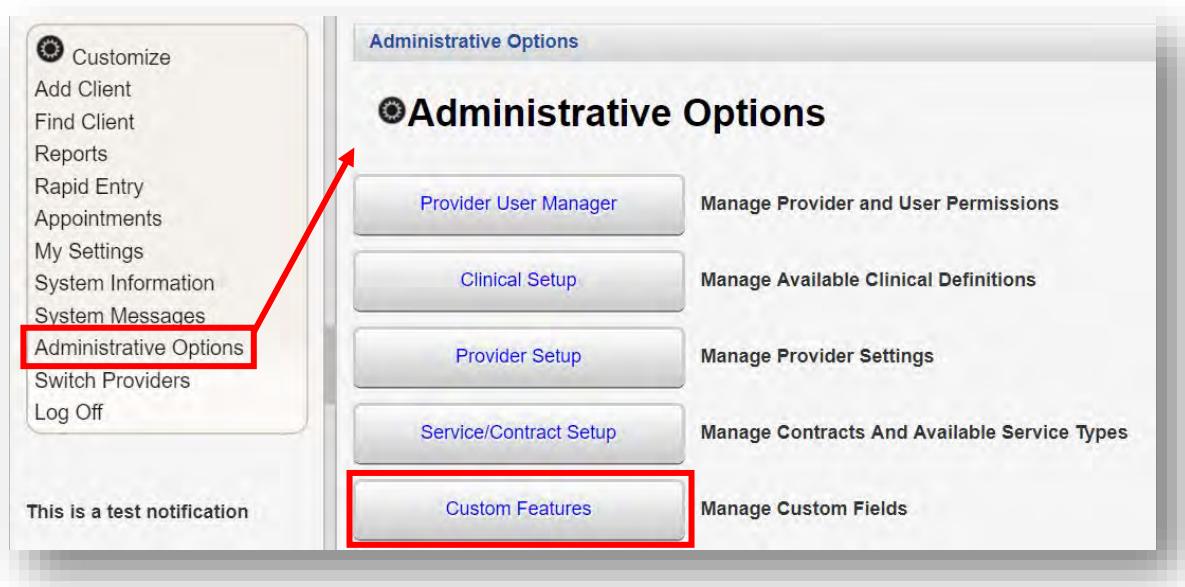
You should think about the organization of the custom information you want to add. For instance, you may want to create a “Food Bank” custom tab, with fields relevant to food bank services such as whether a client is diabetic, how many visits a month they are approved for, etc. Note, fields that are longitudinal in nature and updated each visit will need to go on a custom subform.

Custom tabs and fields can be made available to multiple providers. For instance, if you create a field where you can specify that a client is diabetic, that information can be made available to all providers who have access to this client’s record and activate the relevant field on a custom tab. (This would not apply to a custom service field as service data is provider specific.)

Customizing Custom Tabs

CAREWare offers a variety of custom tabs you can use to expand the range of client data you collect and report. In our examples below, we’ll set up a tab to collect information we can use to run a food bank program. All custom fields can be used in custom reports.

1. Log into CAREWare. For more details on how to do so, please refer to **Quick Start Guide #1**. If you have administrative privileges and are asked to choose between Central Administration and Provider (“Default” until you change the name). Log into a Provider domain to complete the following steps.
2. Select **Administrative Options** from the **Menu of Links** and then **Custom Features**.



3. The Custom Feature Setup menu will appear. Select **Custom Tab 1**



Administrative Options > Custom Feature Setup

Back

Custom Feature Setup

Custom Control Setup Add/Edit/Delete Custom Control Definitions

Demographics Tab Custom Field Manage the demographics tab custom field

Custom Tab 1 Manage Custom Tab 1

4. Click **Custom Tab Properties**. From this menu link you can rename the selected custom tab.



Administrative Options > Custom Feature Setup > Custom Tab Setup

Back

Custom Tab Setup

Custom Tab Properties Current name: Custom Tab 1 Data Entry Mode: Normal Data Entry

Manage custom controls Manage custom controls for the Custom Tab 1 tab

5. Rename the tab name from “Custom Tab 1” to your desired tab name. In this example, we are renaming it “Food Bank”. Click **Save**, then click **Back** (will appear after clicking Save).



TIP: In many cases, you'll want to create “drop down” box selections for data entry. This is best used in cases where you want to standardize data entry from multiple users (i.e., how many food bags a month a client can receive).

You may also need to create “free-form” text data entry fields for cases where data entry can vary (e.g., you may not be able to predict all the possible food allergies a person may have, and may need to add them manually). We'll cover both of these, starting with the free form option.

Custom fields have different available parameters, depending on the type of Control that is created. Now we are ready to Add/Edit/Delete Custom Controls, which is the technical name for custom fields.

The following are available **Control Type** options:

- **TextBox** – allows free-form data entry of any text, up to the configured character length
- **ComboBox** – allows for a drop-down menu of preset selections to be created.
- **CheckBox** – allows for selection of Yes or No.
- **DatePicker** – will limit data entry to a Date only, in the MM/DD/YYYY format.
- **Attachment** – allows documents to be uploaded to client records, (such as copies of intake forms, client eligibility, etc.).
- **Hyperlink** – allows a direct link to a webpage or website, such as, HIV treatment guidelines or the HRSA CAREWare website.
- **Memo** – allows for a large amount of free-form text to be entered

Creating a TextBox Custom Control

1. From the Custom Feature Setup menu, click **Custom Control Setup**.

Administrative Options > Custom Feature Setup

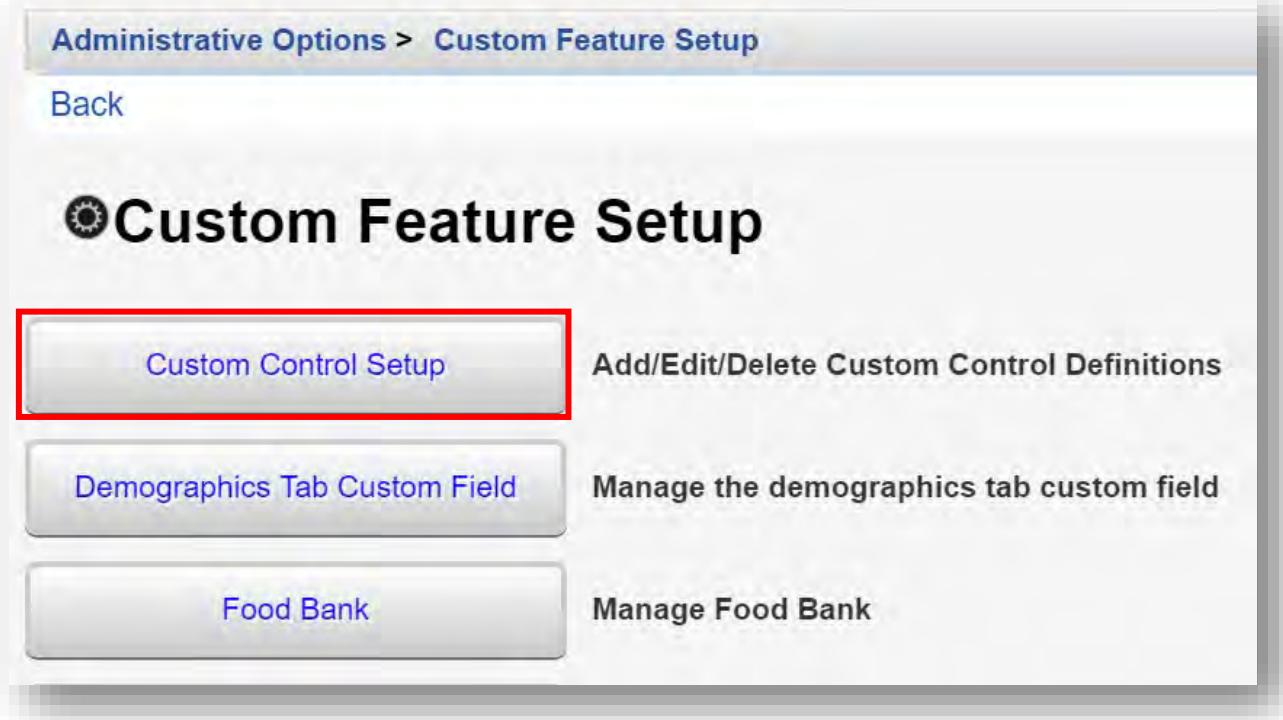
Back

Custom Feature Setup

Custom Control Setup Add/Edit/Delete Custom Control Definitions

Demographics Tab Custom Field Manage the demographics tab custom field

Food Bank Manage Food Bank



2. Click **Add**.

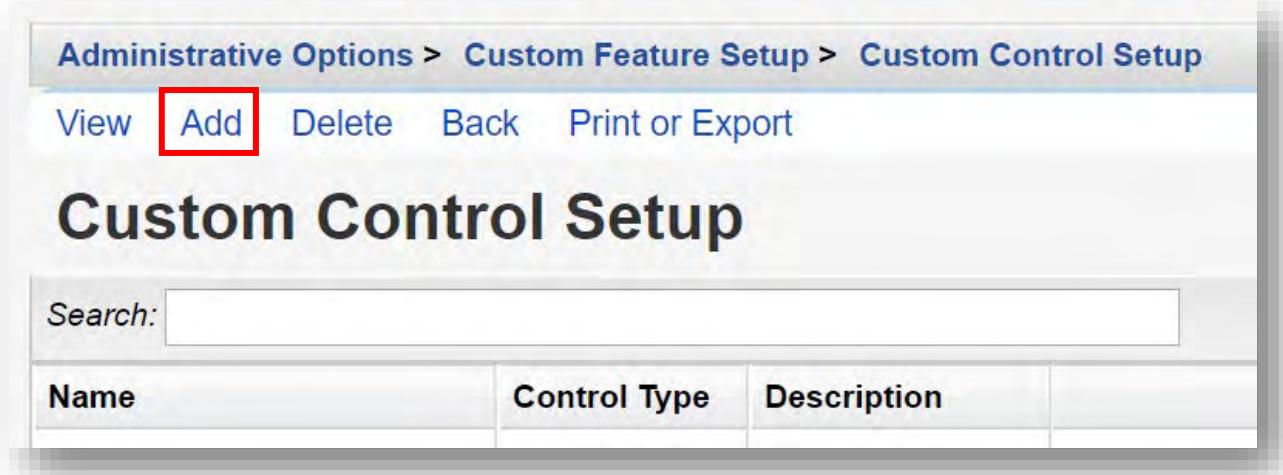
Administrative Options > Custom Feature Setup > Custom Control Setup

View **Add** Delete Back Print or Export

Custom Control Setup

Search:

Name	Control Type	Description



3. Enter in the following information. When complete, click **Save**.

- **Name** – control name or custom field name
- **Description**
- **Control Type** – select TextBox
- **Numeric** (checkbox) – will limit data-entry to Numbers only
- **Required** (checkbox) – allows you to specify that, once the user clicks this custom field, a value *must* be entered
- **Length** – limits the allowable number of field characters
- **Mask Char** (optional) – the character that will replace masked values
- **Mask Length** (optional) – the number of characters that will be masked
- **Mask From Left** (check box) (optional) – the mask direction

Administrative Options > Custom Feature Setup > Custom Control Setup > Add

Save [Back](#)

Add

Name:	Food Allergies
Description:	Food Allergies
Control Type:	TextBox 
Numeric:	<input type="checkbox"/>
Required:	<input type="checkbox"/>
Length:	40
Mask Char:	<input type="text"/>
Mask Length:	<input type="text"/>
Mask From Left:	<input checked="" type="checkbox"/>

4. A custom field has now been added (in this example, Food Allergies). Click **Back**.

Administrative Options > Custom Feature Setup > Custom Control Setup

View Add Delete **Back** Print or Export

Custom Control Setup

Search: Food Allergies

Name	Control Type	Description
Food Allergies	TextBox	Food Allergies

5. Click on **Food Bank** (the tab name changed in the previous section).

Administrative Options > Custom Feature Setup

Back

Custom Feature Setup

Custom Control Setup Add/Edit/Delete Custom Control Definitions

Demographics Tab Custom Field Manage the demographics tab custom field

Food Bank Manage Food Bank

6. Click on **Manage custom controls**

Administrative Options > Custom Feature Setup > Custom Tab Setup

Back

Custom Tab Setup

Custom Tab Properties

Current name: Food Bank Data Entry Mode: Normal Data Entry

Manage custom controls

Manage custom controls for the Food Bank tab

7. Notice the newly created Food Allergies TextBox control is not Active (use the Search bar to filter). Only controls that are “Active” will show under the custom tab(s). To activate a desired custom control, select it, and click **Activate**. The text “YES” appears in the Active column, indicating that the custom control field will be visible, under the custom tab, Food Bank.

Administrative Options > Custom Feature Setup > Custom Tab Setup > Custom Control Setup

Activate Deactivate Move Up Move Down Toggle Search Toggle Rapid Entry Back Print or Export

Custom Control Setup

Search: Food Allergies

Active	Name	Control Type	Search By	Description	Show On Rapid Service Entry
Yes	Food Allergies	TextBox		Food Allergies	

Use the same process to Activate or Deactivate other custom controls, under each custom tab. Deactivating a custom control will not affect previously entered data.



WARNING: Deleting a custom control will also delete ALL data previously entered in the control field, so it should be used with extreme caution.

Creating a Combo Box Custom Control

1. From the Custom Feature Setup menu, click **Custom Control Setup**.

Administrative Options > Custom Feature Setup

Back

Custom Feature Setup

Custom Control Setup (highlighted with a red box)

Add/Edit/Delete Custom Control Definitions

Demographics Tab Custom Field

Manage the demographics tab custom field

Food Bank

Manage Food Bank

2. Click **Add**.

Administrative Options > Custom Feature Setup > Custom Control Setup

View **Add** (highlighted with a red box) Delete Back Print or Export

Custom Control Setup

Search:

Name	Control Type	Description

3. Enter in the following information (in this example, we are creating a custom control name, "Dietary Needs"). When complete, click **Save**.

- **Name** – control name or custom field name
- **Description**
- **Control Type** – select ComboBox
- **Required** (checkbox) – allows you to specify that, once the user clicks this custom field, a value *must* be entered
- **Activate Values Automatically** (checkbox) – leave checked (default value)

Administrative Options > Custom Feature Setup > Custom Control Setup > Add

[Save](#) [Back](#)

Add

Name:	<input type="text" value="Dietary Needs"/>
Description:	<input type="text" value="Dietary Needs"/>
Control Type:	ComboBox 
Required:	<input type="checkbox"/>
Activate Values Automatically:	<input checked="" type="checkbox"/>

4. Select **Edit Values**.

Administrative Options > Custom Feature Setup > Custom Control Setup > View

[Edit](#) [Edit Values](#) [Back](#)

View

Name:	<input type="text" value="Dietary Needs"/>
Description:	<input type="text" value="Dietary Needs"/>
Control Type:	ComboBox
Required:	<input type="checkbox"/>
Activate Values Automatically:	<input checked="" type="checkbox"/>

5. Click **Add**.

Administrative Options > Custom Feature Setup > Custom Control Setup > View > Edit Values

[View](#) [Add](#) [Edit](#) [Activate](#) [Deactivate](#) [Activate All](#) [Deactivate All](#) [Delete](#) [Back](#) [Print or Export](#)

Combo Box Value Setup

Search:



6. Enter in the following information (in this example, we are creating a value name, "Diabetic"). When complete, click **Save**.

- **Code** (required)
- **Value** (required)

Administrative Options > Custom Feature Setup > Custom Control Setup > View > Edit Values

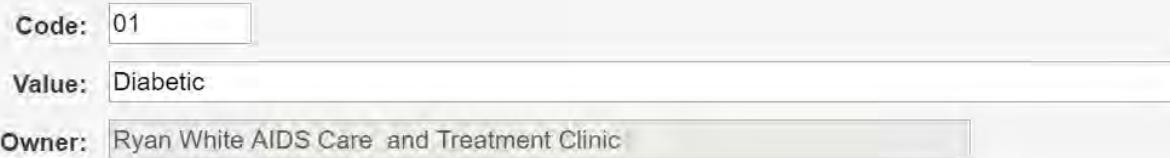
[Save](#) [Cancel](#)

Add

Code:

Value:

Owner:



7. Repeat steps 5 and 6, as necessary. When complete, the Combo Box Value Setup menu will display all added values.

Administrative Options > Custom Feature Setup > Custom Control Setup > View > Combo Box Value Setup

View Add Edit Activate Deactivate Activate All Deactivate All Delete Back Print or Export

Combo Box Value Setup

Search:

Active	Code	Value	Owner
Yes	01	Diabetic	Ryan White AIDS Care
Yes	02	Kosher	Ryan White AIDS Care
Yes	03	Vegan	Ryan White AIDS Care

8. Return to the Custom Feature Setup menu by clicking **Custom Feature Setup** within the breadcrumb links (see previous screenshot). The menu is also accessible by clicking **Back** multiple times.

9. Click **Food Bank**.

Administrative Options > Custom Feature Setup

Back

Custom Feature Setup

Custom Control Setup Add/Edit/Delete Custom Control Definitions

Demographics Tab Custom Field Manage the demographics tab custom field

Food Bank Manage Food Bank

10. Click **Manage custom controls**.

Administrative Options > Custom Feature Setup > Custom Tab Setup

Back

Custom Tab Setup

Custom Tab Properties Current name: Food Bank Data Entry Mode: Normal Data Entry

Manage custom controls Manage custom controls for the Food Bank tab

11. Use the **Search** box to filter the custom control list. Select the desired custom control. Click **Activate**. A “Yes” appears in the Active column, indicating that this custom control field will be visible, under the custom tab.

Administrative Options > Custom Feature Setup > Custom Tab Setup > Custom Control Setup

Activate Deactivate Move Up Move Down Toggle Search Toggle Rapid Entry Back Print or Export

Custom Control Setup

Search: Diet

Active	Name	Control Type	Search By	Description	Show On Rapid Service Entry
Yes	Dietary Needs	ComboBox		Dietary Needs	

When made “Active,” custom control fields are ready for data-entry into client records.



TIP: Combo boxes can also be used to identify staff, such as a case manager, for a service provided. Combo box values can be customized to list agency staff and would be provider-specific.

Creating a Date Picker and Yes/No Box Custom Controls

The procedure for creating these types is similar to the procedure for creating custom TextBox and ComboBox fields.

Selecting control type, **DatePicker**, will allow manual entry of a date or selection of one from the drop-down calendar.

Administrative Options > Custom Feature Setup > Custom Control Setup > Add

Save Back

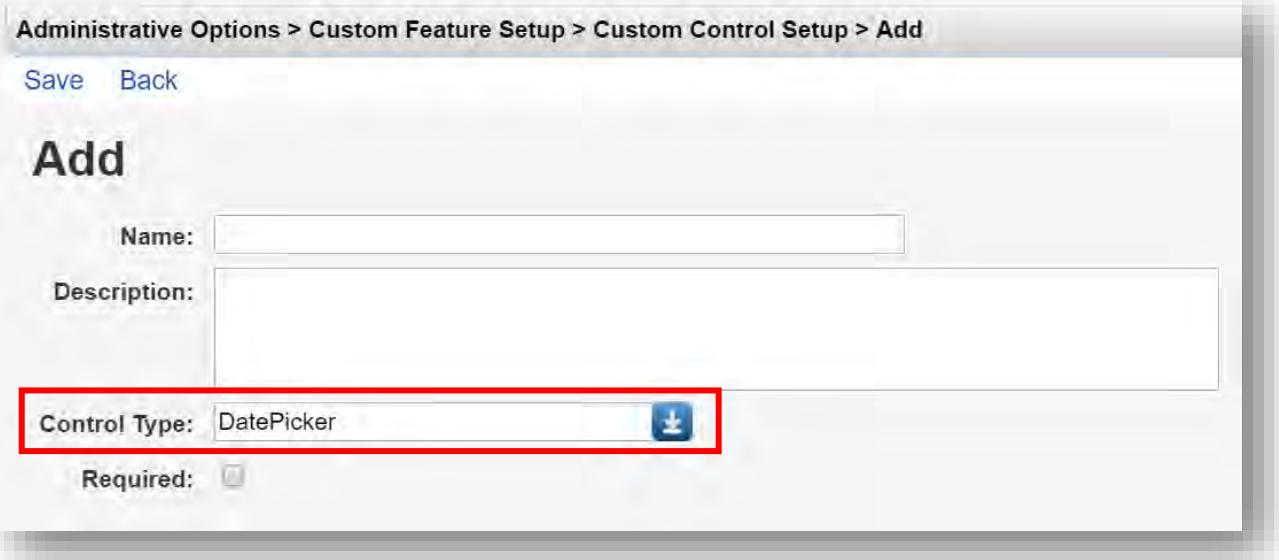
Add

Name:

Description:

Control Type: 

Required:



When selecting control type, selecting **CheckBox**, will allow selection of whether the box is **Checked (Yes)** by default.

Administrative Options > Custom Feature Setup > Custom Control Setup > Add

Save Back

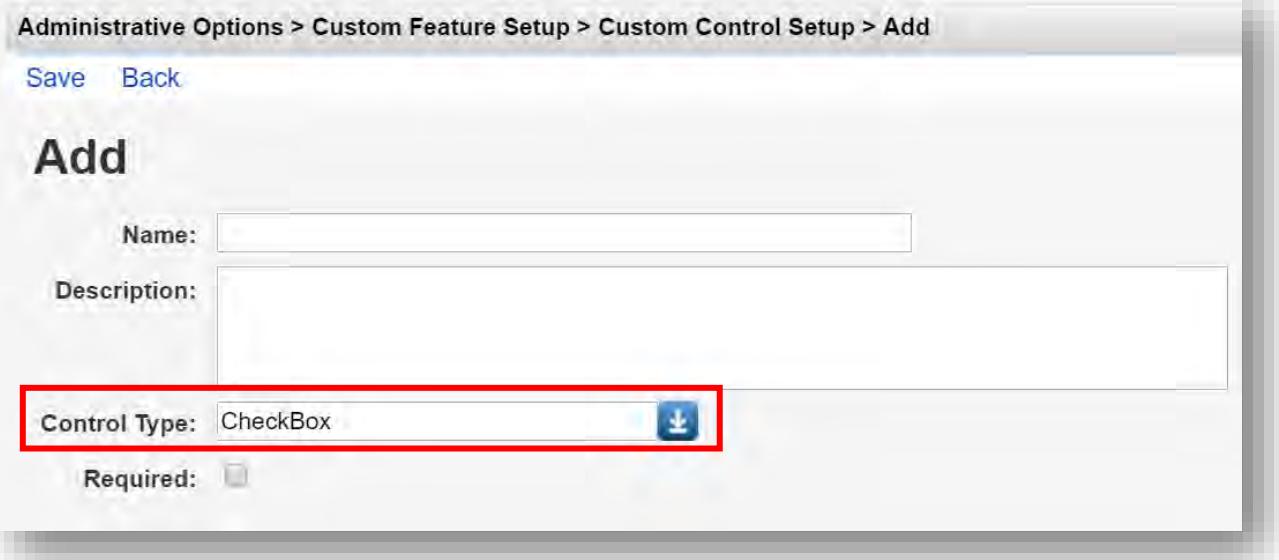
Add

Name:

Description:

Control Type: 

Required:



Creating Hyperlink Custom Controls

You can also create custom hyperlinks to link directly to websites you refer to often, such as CAREWare.

Administrative Options > Custom Feature Setup > Custom Control Setup > Add

Save Back

Add

Name: HRSA CAREWare Website

Description: HRSA CAREWare Website

Control Type: 

URL: <https://hab.hrsa.gov/program-grants-management/careware>

Creating Attachment Custom Controls

You can create attachment custom controls for a variety of file formats (Word, PDF, JPG, etc). By doing so, it will be possible to attach specific documents to an individual client record, such as a scanned HIPAA privacy notice, client ID, or an enrollment form.



TIP: To prevent the CAREWare database from becoming overloaded with client record attachments, they can be stored in a separate system folder. Storage of "attachments" should be managed by your CAREWare system administrator.

1. Enter in the following information. When complete, click **Save**.

- **Name** (required)
- **Description** (required)
- **File Types** – allow upload of specific file format(s). Separate file formats with a semicolon.
- **Length** – automatically set (5000000 default value), refers to maximum size of upload file. This value should be managed by your CAREWare system administrator.

Administrative Options > Custom Feature Setup > Custom Control Setup > View > Edit

Save [Cancel](#)

Edit

Name: Client Documents

Description: Attachments for identification, privacy notice, etc.

Control Type: Attachment

File Types: doc;jpg;pdf;

Length: 5000000

2. Select **Edit Content Types**.

Administrative Options > Custom Feature Setup > Custom Control Setup > View

[Edit](#) **Edit Content Types** [Back](#)

View

Name: Client Documents

Description: Attachments for identification, privacy notice, etc.

Control Type: Attachment

File Types: doc;jpg;pdf;

Length: 5000000

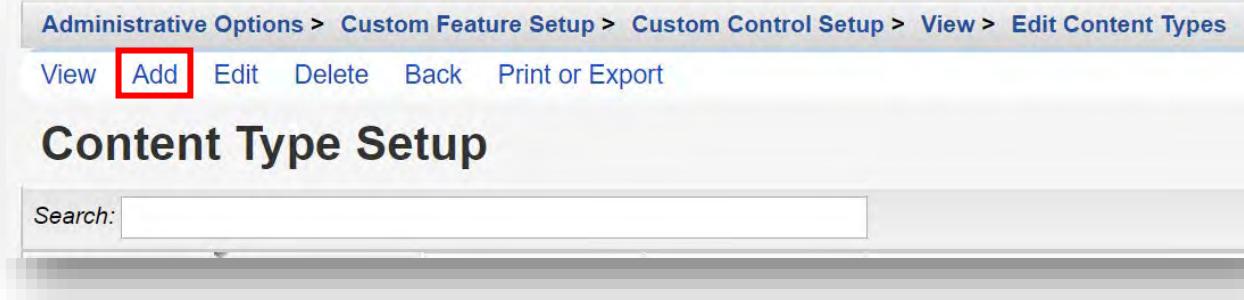
3. Click **Add**.

Administrative Options > Custom Feature Setup > Custom Control Setup > View > Edit Content Types

View **Add** Edit Delete Back Print or Export

Content Type Setup

Search:



4. Enter in the following information. When complete, click **Save**.

- **Name** (required)
- **Universal** (optional) – checking this option makes content type available to all providers within the same CW system.
- **Secure** (optional) – checking this option will require an extra user permission be granted for users to view certain uploaded files.

Administrative Options > Custom Feature Setup > Custom Control Setup > View > Content Type Setup

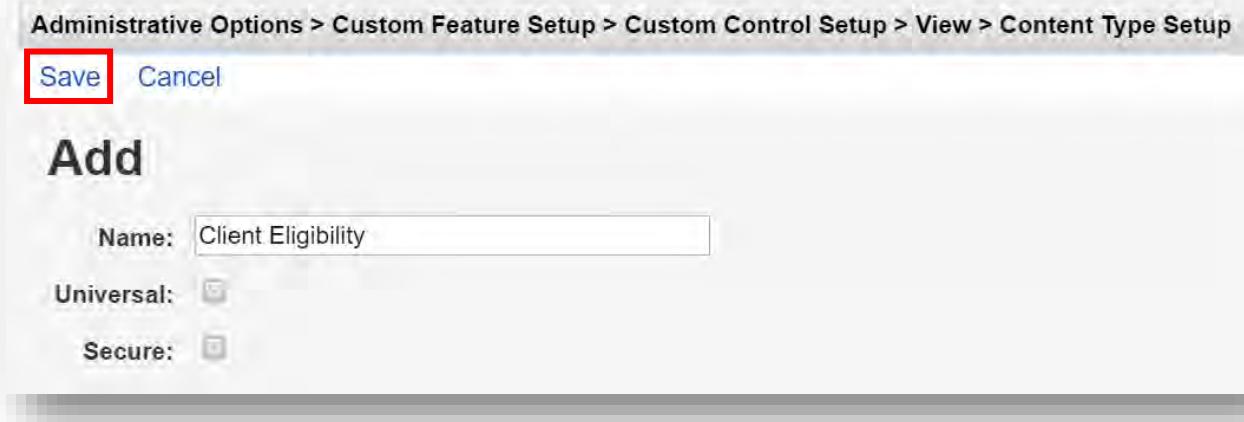
Save Cancel

Add

Name:

Universal:

Secure:



5. Repeat steps 3 and 4, as necessary. When complete, the Content Type Setup menu will display all added values.

Administrative Options > Custom Feature Setup > Custom Control Setup > View > Content Type Setup

View Add Edit Delete Back Print or Export

Content Type Setup

Search:

Name	Universal	Secure
Medicaid eligibility		
Photo		
Side effects		
Client Eligibility		
Signed Confidentiality Agreement	Yes	

Now we're ready to go to a specific client and attach documents to their record. For more details on how to find and open client records, please refer to *Quick Start Guide #3: Adding Clients, Demographics, Services, and Annual Review Data*.

6. Find and Select an existing client record. Click on the “Food Bank” tab created previously.

Find Client > Search Results > Demographics

Delete Client Back

Demographics

Personal Info Name: Appleseed, Johnny, Gender: Male DOB: 12/05/1965

Contact Information 123 Main St Apt 2
Anytown, IN 46213

Race/Ethnicity Hispanic (Other), White

Food Bank View or Edit the client's Food Bank information

7. Select the **0 Attachments** link.

Find Client > Search Results > Demographics > Food Bank

Edit Back

Food Bank

Food Allergies:

Dietary Needs:

Client Documents: **0 Attachments** (Access in view mode only)

8. Click **Add**.

Find Client > Search Results > Demographics > Food Bank >

View **Add** Edit Delete Link Back Print or Export

Attachments

Search:

9. Enter in the following information. When complete, click **Save**.

- **File Name** – browse to the client document to be uploaded.
- **Content Type** – choose from the drop-down menu
- **Comment** (optional)

Find Client > Search Results > Demographics > Food Bank > 1 Attachments > Add

Save [Back](#)

Add

File Name: No file chosen

Content Type:


Comment:

10. The file has been successfully uploaded to the client record as an Attachment. To view the uploaded document, select the desired File Name and click **View**.

Find Client > Search Results > Demographics > Food Bank > 1 Attachments

View [Add](#) [Edit](#) [Delete](#) [Link](#) [Back](#) [Print or Export](#)

Attachments

Search:

Content Type	Attach Date	Attach User	Mod Date	Mod User	File Type
Client Eligibility	4/14/2019	PBYRNE	4/26/2019	PBYRNE	.pdf

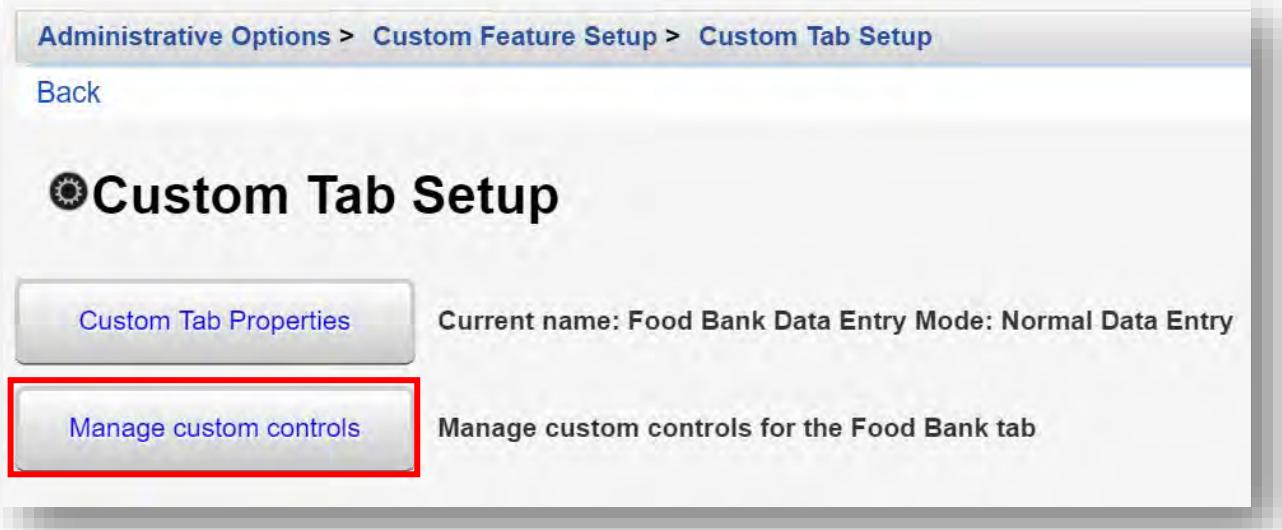


TIP: For multiple provider CAREWare networks - it is recommended to configure "attachment" permissions to allow users to delete ONLY documents they have uploaded. While being able to View other attachments uploaded for their clients.

Setting Custom Field Order

The order of the fields in the Control Manager is the order in which they'll appear horizontally on the data entry screen. You can move fields around on the custom tab using the Field Order functions.

1. From the Custom Tab Setup menu, select **Manage custom controls**.



Administrative Options > Custom Feature Setup > Custom Tab Setup

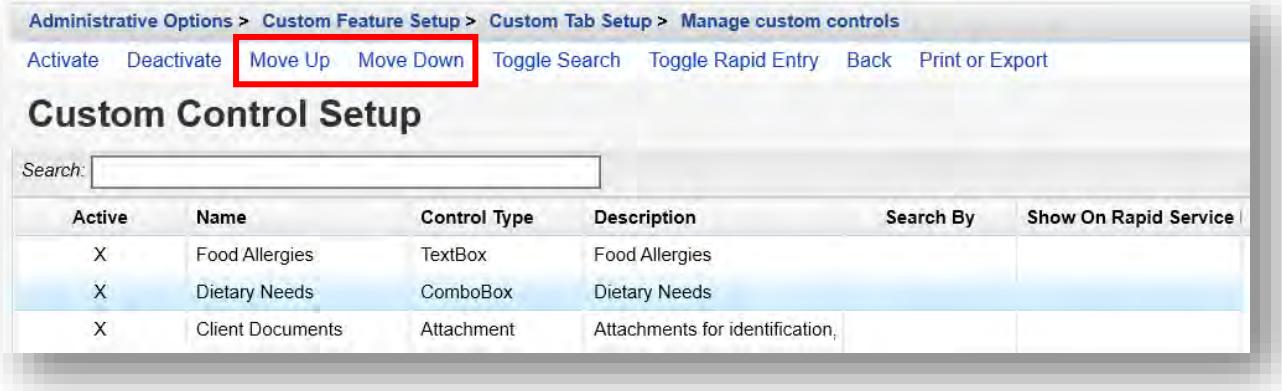
Back

Custom Tab Setup

Custom Tab Properties Current name: Food Bank Data Entry Mode: Normal Data Entry

Manage custom controls Manage custom controls for the Food Bank tab

2. Select a custom control under the Name column. Click **Move Up** or **Move Down**. This will change the order of the custom control in the list. Note: a custom control must be "Active" to change the field order.



Administrative Options > Custom Feature Setup > Custom Tab Setup > Manage custom controls

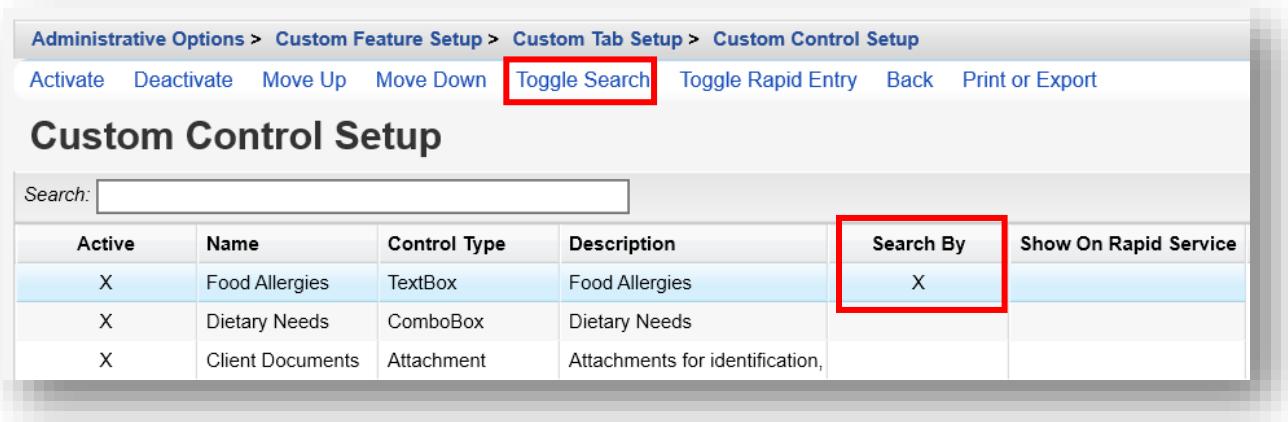
Activate Deactivate Move Up Move Down Toggle Search Toggle Rapid Entry Back Print or Export

Custom Control Setup

Search:

Active	Name	Control Type	Description	Search By	Show On Rapid Service
X	Food Allergies	TextBox	Food Allergies		
X	Dietary Needs	ComboBox	Dietary Needs		
X	Client Documents	Attachment	Attachments for identification,		

3. The **Toggle Search** property allows you to add one or more of your custom fields on the Find Client screen, making the custom control values “searchable” when finding an existing client record. To do so, select the desired custom control and select **Toggle Search**. An “X” appears under the **Search By** column. This indicates that this custom control field will show on the **Find Client** screen.



Administrative Options > Custom Feature Setup > Custom Tab Setup > Custom Control Setup

Activate Deactivate Move Up Move Down **Toggle Search** Toggle Rapid Entry Back Print or Export

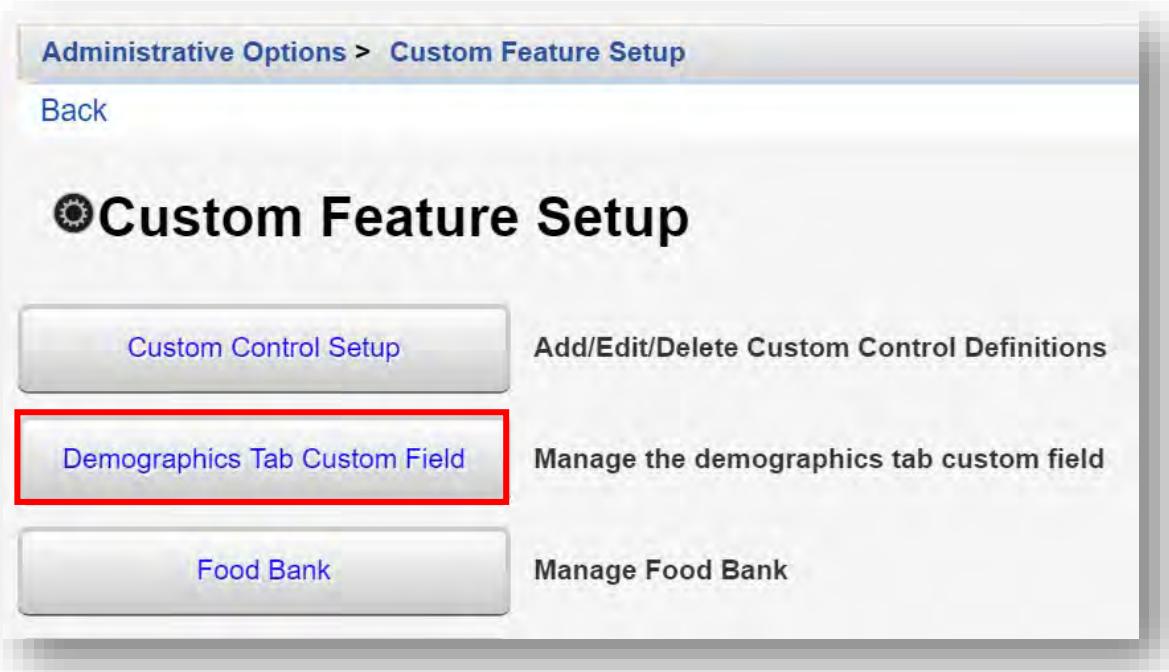
Custom Control Setup

Search: <input type="text"/>					Show On Rapid Service
Active	Name	Control Type	Description	Search By	
X	Food Allergies	TextBox	Food Allergies	X	
X	Dietary Needs	ComboBox	Dietary Needs		
X	Client Documents	Attachment	Attachments for identification,		

Creating Demographics Tab Custom Field

You may select a custom control field for use in the **Personal Info** section of the client **Demographics** menu link. Note: only “ComboBox” or “TextBox” control types are allowed on the **Demographics Tab Custom Field**.

1. From the Custom Features Setup menu, select **Demographics Tab Custom Field**.



Administrative Options > Custom Feature Setup

Back

Custom Feature Setup

Custom Control Setup Add/Edit/Delete Custom Control Definitions

Demographics Tab Custom Field Manage the demographics tab custom field

Food Bank Manage Food Bank

2. Select **Edit**.

Administrative Options > Custom Feature Setup > Demographics Tab Custom Field

Edit Back

Demographics Tab Custom Field

Custom Field:

Include in client search:

Include in rapid service entry:

Include on client add:

Warn for duplicate values:

3. Enter in the following information. When complete, click **Save**.

- **Custom Field** – search by clicking the Magnifying-Glass icon.
- **Include in client search** (checkbox)
- **Include in rapid service entry** (checkbox)
- **Include on client add** (checkbox)
- **Warn for duplicate values** (checkbox)

Administrative Options > Custom Feature Setup > Demographics Tab Custom Field

Save Cancel

Demographics Tab Custom Field

Custom Field: Eligibility Reviewed 

Include in client search:

Include in rapid service entry:

Include on client add:

Warn for duplicate values:

4. In this example, the custom control field, "Eligibility Reviewed" (ComboBox), now appears on the **Personal Info** link within client demographics and is available for use.

Find Client > Search Results > Demographics > Personal Info

Save Cancel

Personal Info

First Name:	Johnny
Middle Name:	
Last Name:	Appleseed
Preferred Language:	
Gender:	Male
Date of Birth:	12/5/1965
DOB Estimated?:	<input type="checkbox"/>
Sex At Birth:	Male
URN:	JHAP1205651U
Encrypted URN:	T+oN+bl1n
Encrypted UCI:	8A30545F3C06276EF0C81A44225A3AEC1B202D9...
Client ID:	EMR123
Last Service:	3/6/2019
Last Poverty Level:	02/18/2019
Eligibility Reviewed:	<input type="button" value="▼"/>

The "Eligibility Reviewed" field is highlighted with a red border. A dropdown menu is open, showing the options "No" and "Yes".

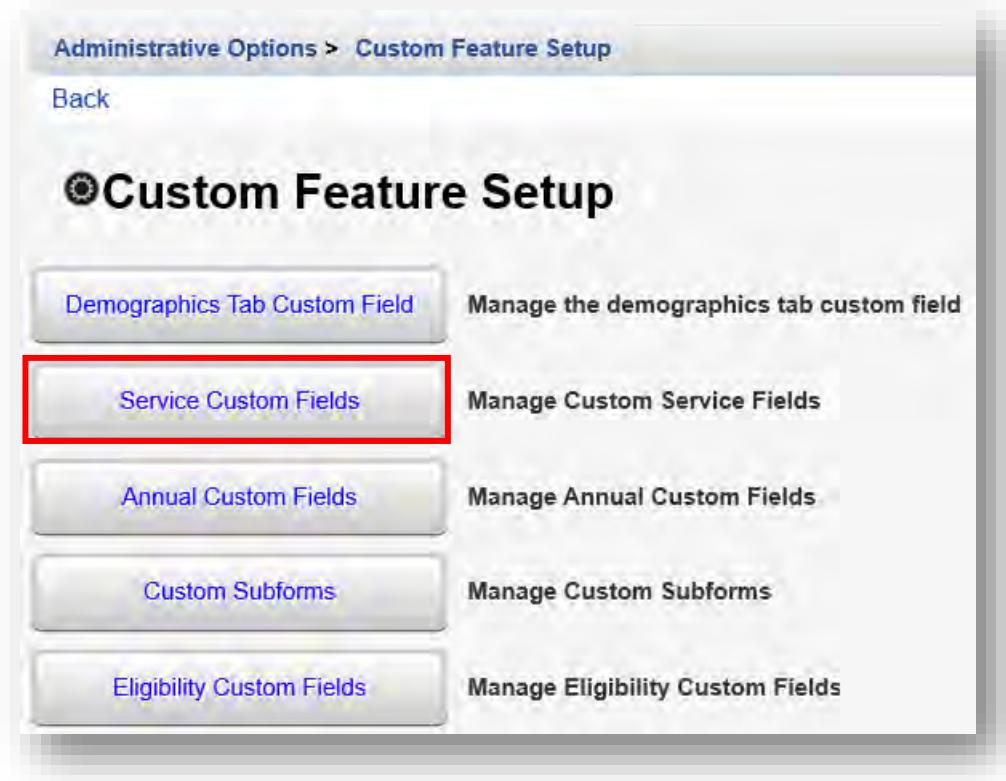


TIP: In the same manner, custom controls can be designated for use in other links in CAREWare, including Service Custom Fields, Annual Custom Fields, Eligibility Custom Fields, etc.

Creating Service Custom Controls

You can extend the range of information you capture for each service visit using service custom control fields. This may include listing the case manager or employee who saw the client or procedures your agency may require on a certain type of service.

1. Select **Service Custom Fields** from the Custom Feature Setup menu.



2. Choose a subservice to manage custom controls. In this example we have selected "All". This will allow the service custom control we choose to be used when any client service is entered. Click **Next**.

Administrative Options > Custom Feature Setup > Service Custom Fields

Next Back Print or Export

Choose a subservice to manage custom controls for

Search:

Service Category	Short Name	Long Name
All	All Subservices	All
Outpatient/Ambulatory Health Services	A/O Medical Care	A/O Medical Care
Treatment Adherence Counseling	Adherence counseling	Default/Treatment Adherence Counseling
Medical Transportation Services	Advocacy	General Client Advocacy

3. Choose a custom control field. In this example, we have selected "Case Manager". Click **Activate** (the custom control must be "Active" to use when adding client services).

Administrative Options > Custom Feature Setup > Service Custom Fields > Custom Control Setup

Activate Deactivate Move Up Move Down Toggle Shared Back Print or Export

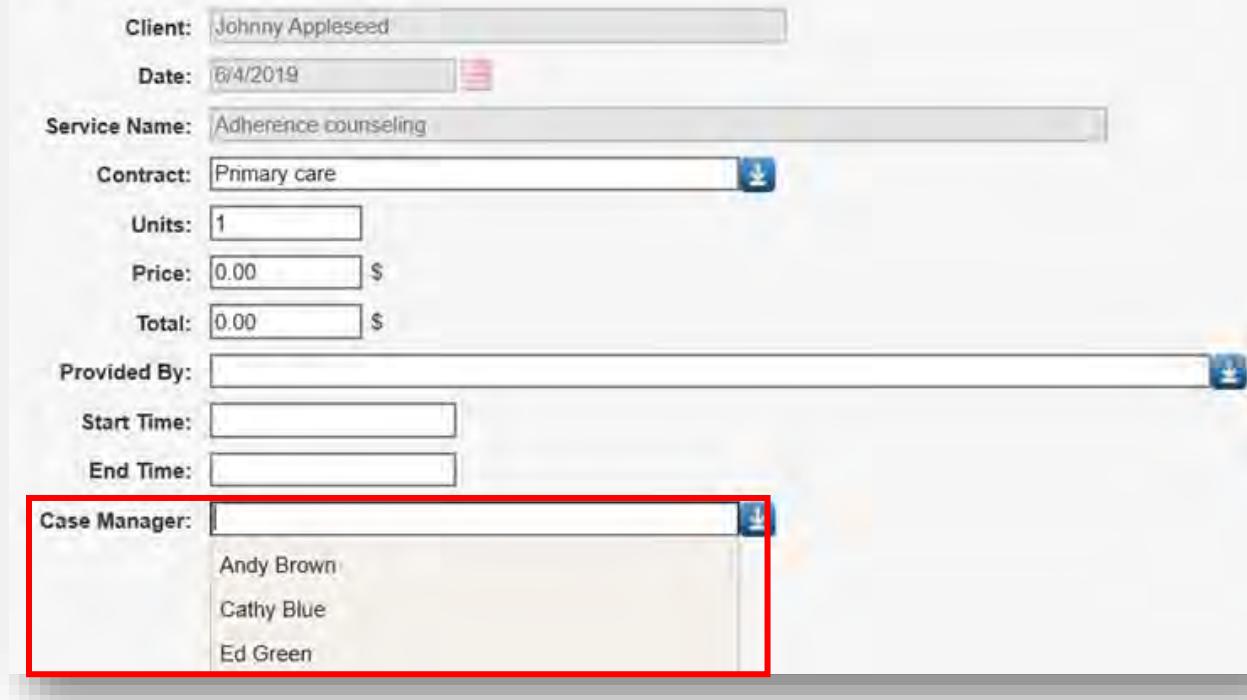
Custom Control Setup

Search: Case Manager

Active	Name	Control Type	Description	Shared
Yes	Case Manager	ComboBox	Case Manager	Yes
	Agency Case Manager	TextBox	Default	

4. The custom control field, "Case Manager" (ComboBox), now appears on the **Add Service** link and is available for use.

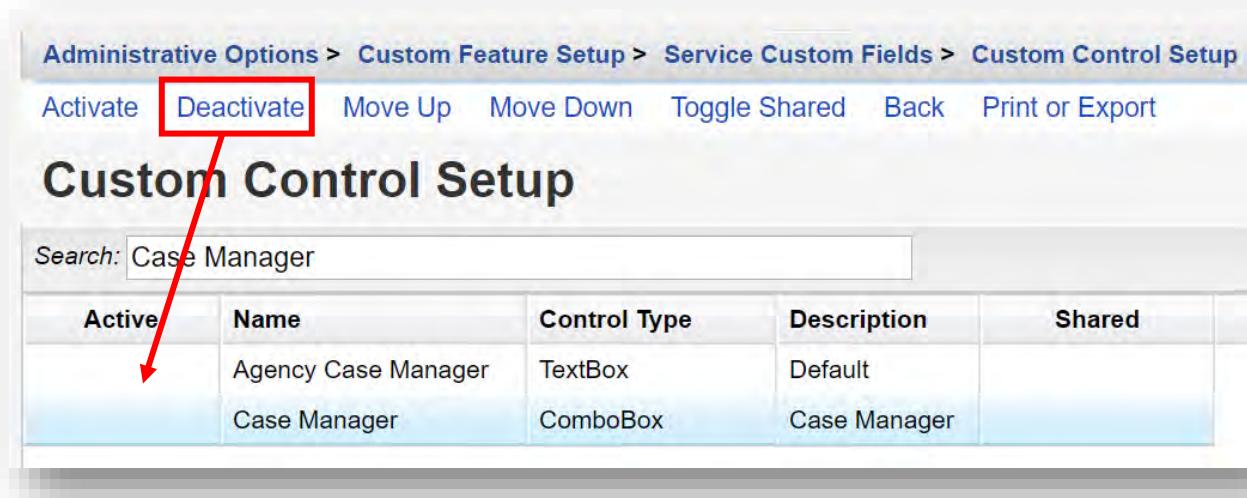
Next



The screenshot shows the 'Add Service' form with various fields: Client (Johnny Appleseed), Date (6/4/2019), Service Name (Adherence counseling), Contract (Primary care), Units (1), Price (0.00 \$), Total (0.00 \$), Provided By (dropdown), Start Time (dropdown), End Time (dropdown), and Case Manager (dropdown). The 'Case Manager' dropdown is highlighted with a red box, and its dropdown menu shows three options: Andy Brown, Cathy Blue, and Ed Green.

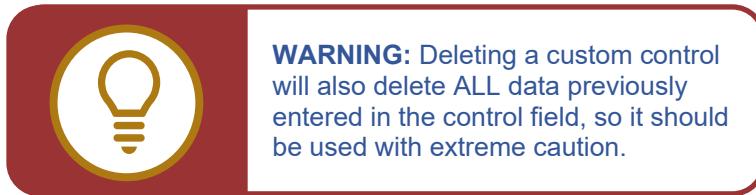
Deactivating Fields

To deactivate a custom control field(s) you don't wish to appear on a link, select the custom control field(s) and select **Deactivate**. The data previously entered will remain in the system, but no additional data can be entered unless the field is reactivated.



The screenshot shows the 'Custom Control Setup' page with the following navigation: Administrative Options > Custom Feature Setup > Service Custom Fields > Custom Control Setup. The top bar includes buttons for Activate, Deactivate (highlighted with a red box), Move Up, Move Down, Toggle Shared, Back, Print or Export. Below is a search bar for 'Case Manager'. A red arrow points from the 'Deactivate' button in the top bar to the 'Active' column in the table. The table has columns: Active, Name, Control Type, Description, and Shared. It lists two entries:

Active	Name	Control Type	Description	Shared
Agency Case Manager	Agency Case Manager	TextBox	Default	
Case Manager	Case Manager	ComboBox	Case Manager	



Using Custom Subforms

Custom subforms allow collection of information that may not be reported elsewhere in CAREWare, such as treatment adherence or client progress. Like service visit data, information on the custom subform will have a date associated with each record.

Be aware, that data entered in Custom Subforms are not reflected or counted on the RSR or other service reports in CAREWare.

Note: The **Custom Subform Tab** is listed on the **Menu of Links**, same as the **Demographics**, **Services**, and **Annual Review** sections of CAREWare.

1. Select **Custom Subforms** from the Custom Feature Setup menu.

Administrative Options > **Custom Feature Setup**

Back

Custom Feature Setup

Demographics Tab Custom Field	Manage the demographics tab custom field
Service Custom Fields	Manage Custom Service Fields
Annual Custom Fields	Manage Annual Custom Fields
Custom Subforms	Manage Custom Subforms

2. Select the desired **Tab Name**. Click **Manage**.

Administrative Options > Custom Feature Setup > Custom Subforms

Manage Add Deactivate Move Up Move Down Delete Back Print or Export

Choose a subform tab to manage

Search:

Active	Tab Name	Date Label	Permission
Yes	Assessment	Assessment Date	None
Yes	Adherence	Contact Date	None
Yes	Default	Custom Subform Date	None

3. Select **Custom Subform Tab Properties**.

Administrative Options > Custom Feature Setup > Custom Subforms > Custom Subform Tab Setup

Back

Custom Subform Tab Setup

Custom Subform Tab Properties

Current name: Default Date Field Label: Custom Subform Date Additional permission requirement: None

Manage custom controls

Manage custom controls for the Default tab

4. Click **Edit**.



Administrative Options > Custom Feature Setup > Custom Subforms > Custom Subform Tab Setup > Custom Subform Tab Properties

Edit Back

Custom Subform Tab Properties

Tab Name: Default

Date Label: Custom Subform Date

PermissionName:

5. Enter in the following information. When complete, click **Save**.

- Tab Name
- Date Label
- PermissionName (drop-down)



Administrative Options > Custom Feature Setup > Custom Subforms > Custom Subform Tab Setup > Custom Subform Tab Properties

Save Cancel

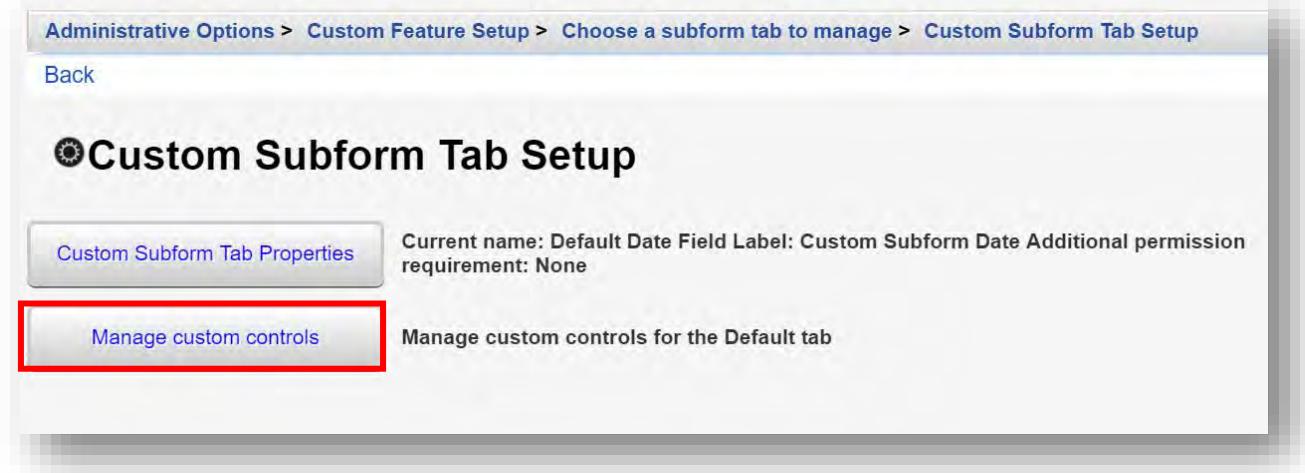
Edit

Tab Name: Default

Date Label: Custom Subform Date

PermissionName:

6. From the Custom Subform Tab Setup menu (return to this menu by clicking Back or using the breadcrumb links) select **Manage custom controls**.



Administrative Options > Custom Feature Setup > Choose a subform tab to manage > Custom Subform Tab Setup

Back

Custom Subform Tab Setup

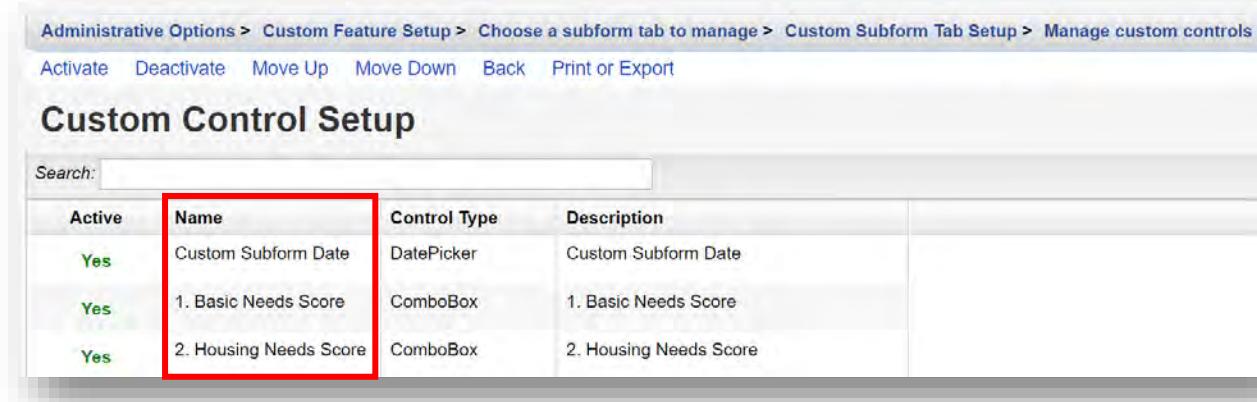
Custom Subform Tab Properties

Current name: Default Date Field Label: Custom Subform Date Additional permission requirement: None

Manage custom controls

Manage custom controls for the Default tab

As an example, the following custom control fields have been created and activated for the **Custom Subform Tab**, named “Default”: Custom Subform Date, 1. Basic Needs Score, and 2. Housing Needs Score.



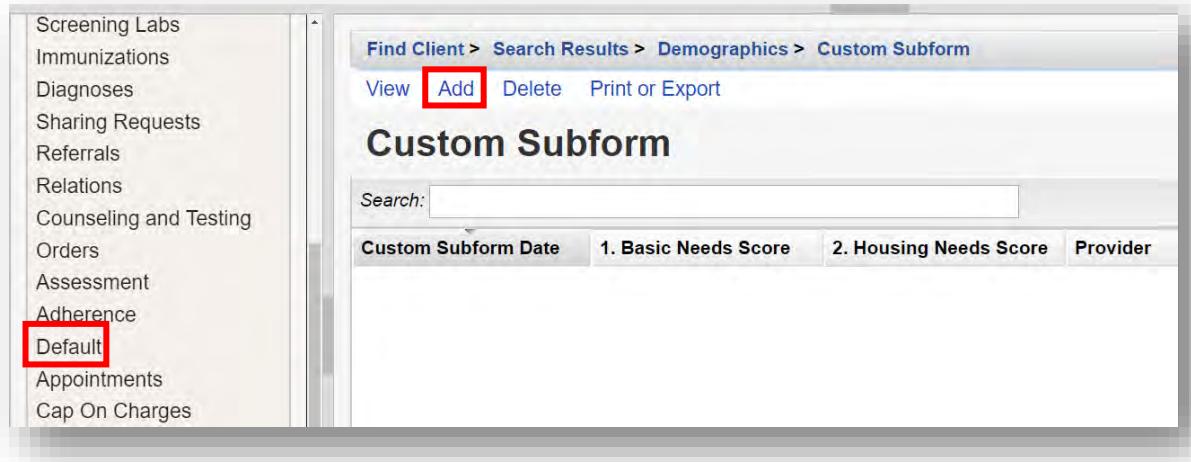
Administrative Options > Custom Feature Setup > Choose a subform tab to manage > Custom Subform Tab Setup > Manage custom controls

Activate Deactivate Move Up Move Down Back Print or Export

Custom Control Setup

Active	Name	Control Type	Description
Yes	Custom Subform Date	DatePicker	Custom Subform Date
Yes	1. Basic Needs Score	ComboBox	1. Basic Needs Score
Yes	2. Housing Needs Score	ComboBox	2. Housing Needs Score

7. **Find and Select** an existing client record (for more details on how to find and open client records, please refer to *Quick Start Guide #3: Adding Clients, Demographics, Services, and Annual Review Data*). Click the menu link **Default** and then click **Add**.



Find Client > Search Results > Demographics > Custom Subform

View **Add** Delete Print or Export

Custom Subform

Custom Subform Date	1. Basic Needs Score	2. Housing Needs Score	Provider

8. Upon completion of data entry for the custom subform, click **Save**.

Find Client > Search Results > Demographics > Default > Add

Save Back

Add

Custom Subform Date:

1. Basic Needs Score:

2. Housing Needs Score:

9. Previous custom subform values will be listed by **Custom Subform Date** for easy viewing and comparison.

Find Client > Search Results > Demographics > Default

View Add Delete Print or Export

Custom Subform

Search:

Custom Subform Date	1. Basic Needs Score	2. Housing Needs Score	Provider
03/29/2019	4	3	Ryan White AIDS Care and Treatment Clinic
12/31/2018	0	5	Ryan White AIDS Care and Treatment Clinic

CAREWare 6



Section 5:

Clinical Setup and Medical Data Entry

Adapted from HRSA Quick Start User Guides:
<https://hab.hrsa.gov/program-grants-management/careware>

PLEASE NOTE: The client data used in these manuals is purely fictional.

First Things First

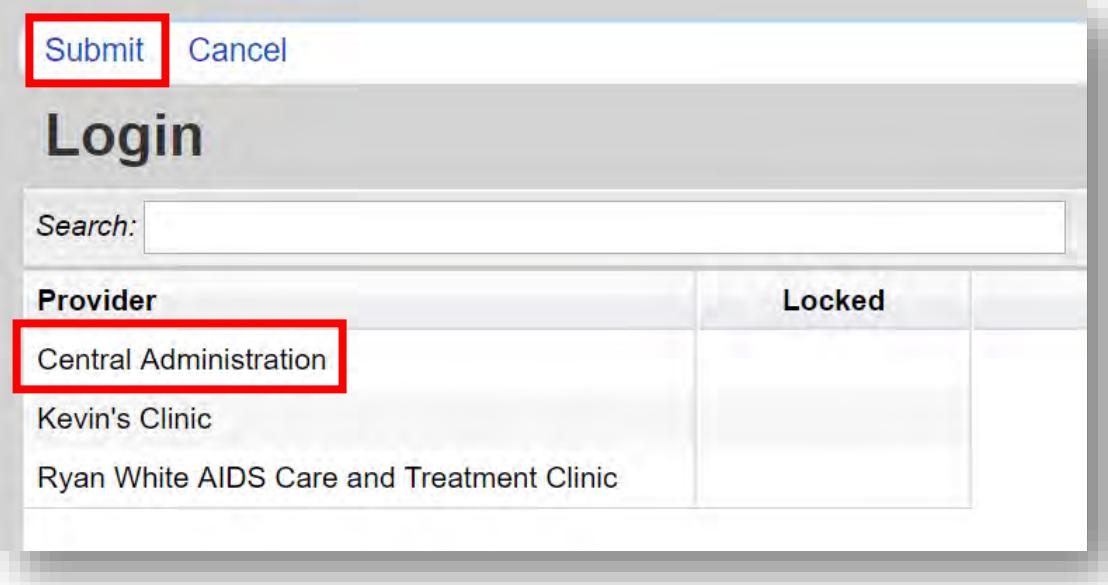
Getting Started

- You must have the appropriate user privileges to run reports.
- You should have at least one client entered in the system so you can see how your clinical data will look.

Clinical Setup

CAREWare comes prepackaged with the RSR-required, HIV-related tests, screenings, immunizations, and medications. However, it is easy to create additional custom clinical tests and screenings.

1. Log into CAREWare. For more details on how to do so, please refer to the **Navigating CAREWare Version 6.0 Guide**. If you are part of a CAREWare network, with multiple providers connected to one, central database, it is recommended that you manage Clinical Setup from the **Central Administration** domain. This will help ensure greater consistency in custom field coding and naming conventions.

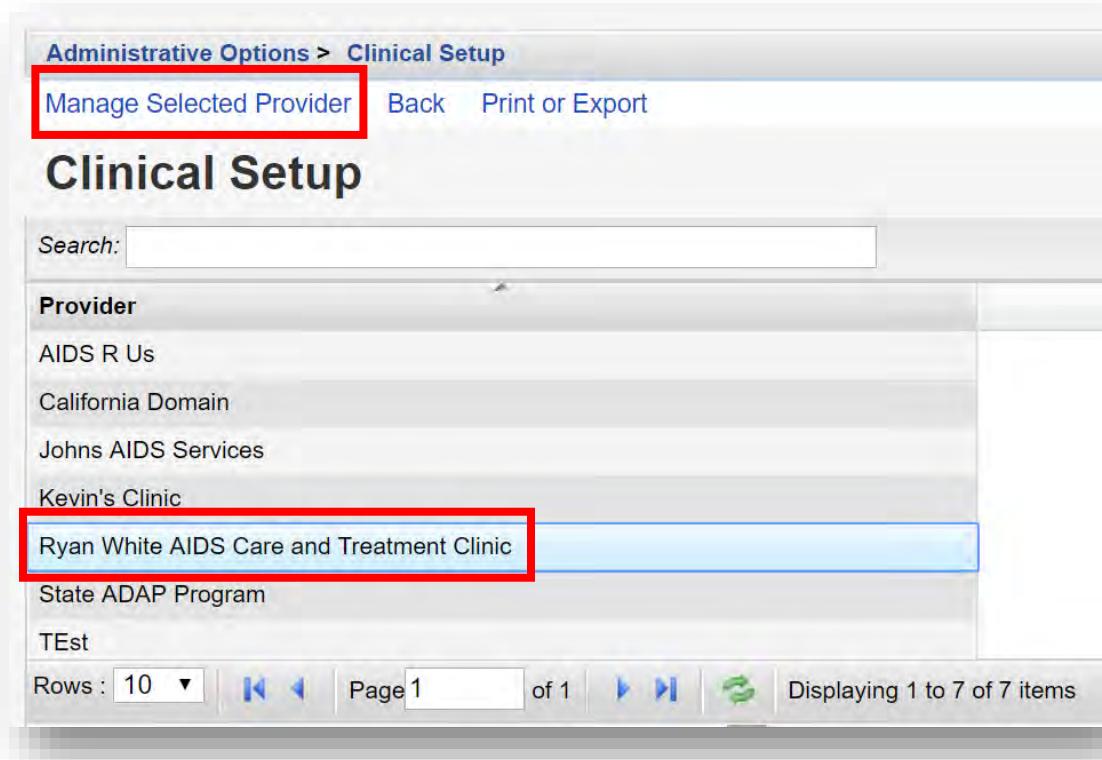


Provider	Locked
Central Administration	
Kevin's Clinic	
Ryan White AIDS Care and Treatment Clinic	

2. Select **Administrative Options** from the **Menu of Links** and then **Clinical Setup** from the administrative options.



3. From the **Clinical Setup** screen, select a **Provider** and then select **Manage Selected Provider**.



Lab Setup

1. From the **Manage Selected Provider** screen, select **Lab Setup**.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic
Back

Ryan White AIDS Care and Treatment Clinic

Lab Setup	31 / 33 Labs Activated
Screening Lab Setup	28 / 39 Screening Labs Activated
Screening Setup	34 / 49 Screenings Activated
Immunization Setup	13 / 21 Immunizations activated
Medication Setup	76 / 498 medications activated
Medication Definitions File	Update the medications file or import new medications from the current file
Diagnosis Setup	43028 / 43028 Diagnosis definitions activated

2. HRSA Defined labs are clearly listed with an X under the HRSA column. In this example, ten (10) lab tests are listed.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Lab Setup

Edit View Add Delete Activate Deactivate Activate All Deactivate All Back Print or Export

Lab Setup

Search:

Active	HRSA	Test	Low	High	Decimals
X	X	CD4 Count	0	1200	0
X	X	Viral Load	0	1000000000	0
X	X	HDL	30	90	0
X	X	WBC	2	11	1
X	X	CD4 Percent	0	100	1
X	X	Glucose	70	115	0
X	X	Hemoglobin	12	18	1
X	X	Platelets	130000	370000	0
X	X	Albumin	3.5	5.5	1
X	X	Total Cholesterol	90	200	0

3. A system warning will appear upon any attempt to **Edit** a HRSA Defined lab, screening lab, screening, or immunization record in CAREWare.

The lab record is HRSA defined and can not be edited

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Lab Setup

Edit View Add Delete Activate Deactivate Activate All Deactivate All Back Print or Export

Lab Setup

Search:

Active	HRSA	Test	Low	High	Decimals
X	X	CD4 Count	0	1200	0

4. To add a custom lab test, begin by clicking **Add** from the **Lab Setup** screen.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Lab Setup

Edit View **Add** Delete Activate Deactivate Activate All Deactivate All Back Print or Export

Lab Setup

Search:

Active	HRSA	Test	Low	High	Decimals
X	X	CD4 Count	0	1200	0
X	X	Viral Load	0	1000000000	0
X	X	HDL	30	90	0
X	X	WBC	2	11	1
X	X	CD4 Percent	0	100	1
X	X	Glucose	70	115	0
X	X	Hemoglobin	12	18	1
X	X	Platelets	130000	370000	0
X	X	Albumin	3.5	5.5	1
X	X	Total Cholesterol	90	200	0

5. Enter in the following information (as applicable) and click **Save**. Only the test name is required, but the other items should help to improve data quality.

- **Test Name**
- **Units (mm/s)**
- **Low Value**
- **High Value**
- **Decimal Places**
- **Test Name For HRSA Reporting**

Currently the only two lab tests that are reported in the RSR are the CD4 count and the viral load.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Lab Setup > Add

Save **Cancel**

Add

Test Name:

Units (mm/s):

Low Value:

High Value:

Decimal Places:

Test Name For HRSA Reporting: 



NOTE: A custom Lab test can also be linked to an existing HRSA Defined Lab using the **Test Name For HRSA Reporting** field box.

Screening Lab Setup

1. From the **Manage Selected Provider** screen, select **Screening Lab Setup**.



Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic

Back

Ryan White AIDS Care and Treatment Clinic

Lab Setup	31 / 33 Labs Activated
Screening Lab Setup	28 / 39 Screening Labs Activated
Screening Setup	34 / 49 Screenings Activated
Immunization Setup	13 / 21 Immunizations activated
Medication Setup	76 / 498 medications activated
Medication Definitions File	Update the medications file or import new medications from the current file
Diagnosis Setup	43028 / 43028 Diagnosis definitions activated

2. HRSA Defined Screening Labs are clearly listed with an X under the HRSA column. In this example, ten (10) screening lab tests are listed.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Lab Setup

Edit View **Add** Delete Activate Deactivate Activate All Deactivate All Back Print or Export

Screening Lab Setup

Search:

Active	HRSA Defined	Test	Titer	Treatment
X	X	IGRA		X
X	X	Hepatitis A Ab-Total		
X	X	Hepatitis B surface-antigen (HBsAg)		
X	X	Hepatitis B surface-antibody (HBsAb)		
X	X	Hepatitis C antibody		X
X	X	Cytomegalovirus (CMV)		
X	X	Syphilis	X	X
X	X	Toxoplasma IgG antibody		
X	X	Chlamydia	X	X
X	X	Genital Herpes	X	X

3. To add a custom screening lab test, begin by clicking **Add** from the **Screening Lab Setup** screen (see previous screenshot).

4. Enter the **Test Name** of the custom screening lab and use the check boxes to indicate whether a **Titer** needs to be entered, and whether to activate a **Treatment** (Yes/No option). Click **Save**.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Lab Setup > Add

Save Cancel

Add

Test Name:

Titer:

Treatment:

Test Name For HRSA Reporting: 



NOTE: A custom Lab test can also be linked to an existing HRSA Defined Screening Lab using the **Test Name For HRSA Reporting** field box.

Screening Setup

1. From the **Manage Selected Provider** screen, select **Screening Setup**.



Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic

Back

Ryan White AIDS Care and Treatment Clinic

Lab Setup	31 / 33 Labs Activated
Screening Lab Setup	28 / 39 Screening Labs Activated
Screening Setup	34 / 49 Screenings Activated
Immunization Setup	13 / 21 Immunizations activated
Medication Setup	76 / 498 medications activated
Medication Definitions File	Update the medications file or import new medications from the current file
Diagnosis Setup	43028 / 43028 Diagnosis definitions activated

2. HRSA Defined Screenings are clearly listed with an X under the HRSA Defined column. The phrase *pap* was entered into the Search box to filter the screening results. In this example, five (5) screenings that include the phrase “pap” are listed.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Setup

Edit View **Add** Delete Activate Deactivate Activate All Deactivate All Back Print or Export

Screening Setup

Search:

Active	HRSA Defined	Test	Test Class	Action Class	Excluded Gender
X	X	Pap Smear	Pap Test		Male
X	X	Colposcopy	Pap Test		Male
X	X	Pelvic exam	Pelvic/Rectal Pap		Male
X		Rectal Pap Smear	Pelvic/Rectal Pap		
		Anal Pap	analpapres	analpapact	Female

3. To add a custom screening lab test, begin by clicking **Add** from the **Screening Setup** screen (see previous screenshot).

4. In this example, a custom screening test will be created for *Tobacco Use*.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Setup > Add

Save Cancel

Add

Test Name:

Result Class:

Action Class:

Excluded Gender:

Min Score:

Max Score:

Score Decimal Places (0-2):

Test Name For HRSA Reporting:



NOTE: A custom Lab test can also be linked to an existing HRSA Defined Screening using the **Test Name For HRSA Reporting** field box.

5. Enter in the following information (as applicable) and click Save (see previous screenshot).

- **Test Name**
- **Result Class**
- **Action Class**
- **Excluded Gender**
- **Min Score**
- **Max Score**
- **Score Decimal Place (0-2)**
- **Test Name For HRSA Reporting**

A **Result Class** allows you to create a drop-down list of possible results for a screening, and an **Action Class** allows you to create a drop-down list of possible actions taken due to a specific result. For the Tobacco Use screening, we'll create a new **Result Class** for *Method of intake* and a new **Action Class** for *Nicotine Patch*.

6. From the **Manage Selected Provider** screen, select **Screening Result Class setup**. If this option is not available, you may need to configure the Personal Menu Settings by clicking the gear icon next to the selected provider's name.

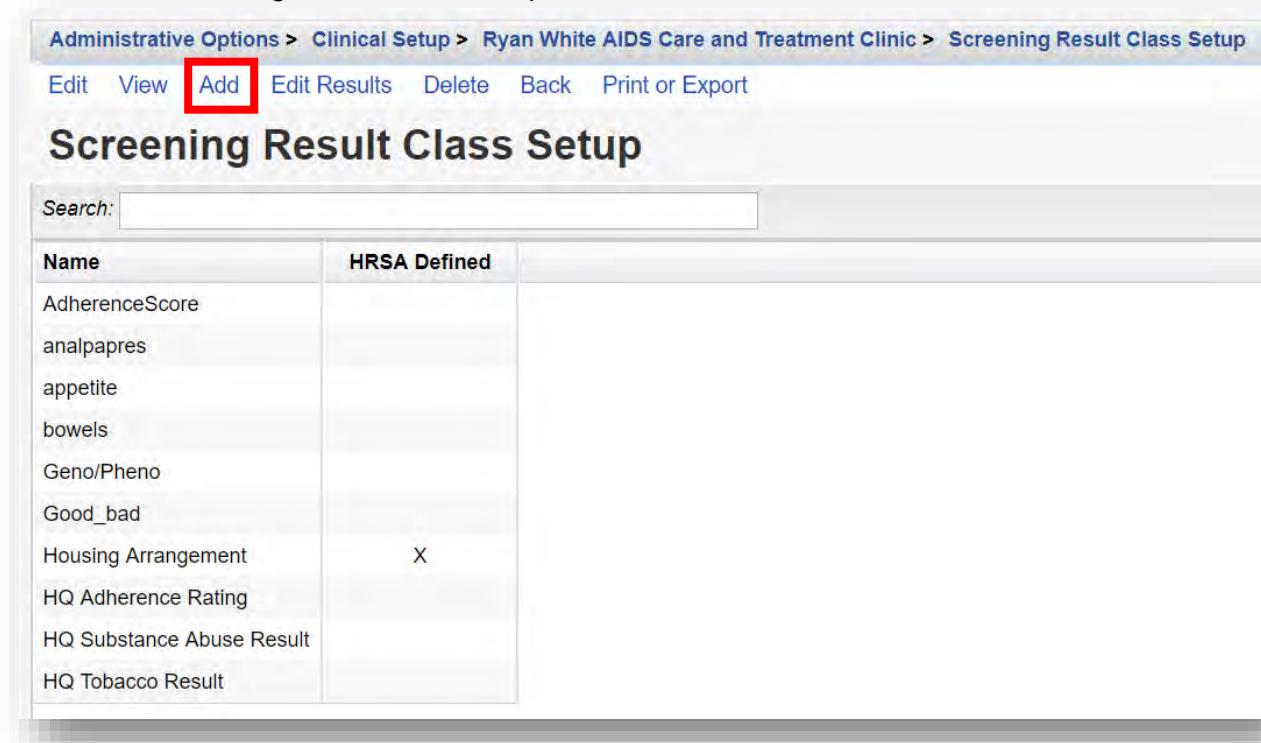
Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic

Back

→ **Ryan White AIDS Care and Treatment Clinic**

Lab Setup	31 / 33 Labs Activated
Screening Lab Setup	28 / 39 Screening Labs Activated
Screening Setup	34 / 49 Screenings Activated
Screening Action Class Setup	16 total Action Classes
Screening Result Class setup	31 total Result Classes
Immunization Setup	13 / 21 Immunizations activated
Medication Setup	76 / 498 medications activated
Medication Definitions File	Update the medications file or import new medications from the current file
Diagnosis Setup	43028 / 43028 Diagnosis definitions activated

7. On the Screening Result Class Setup menu, select **Add**.



Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Result Class Setup

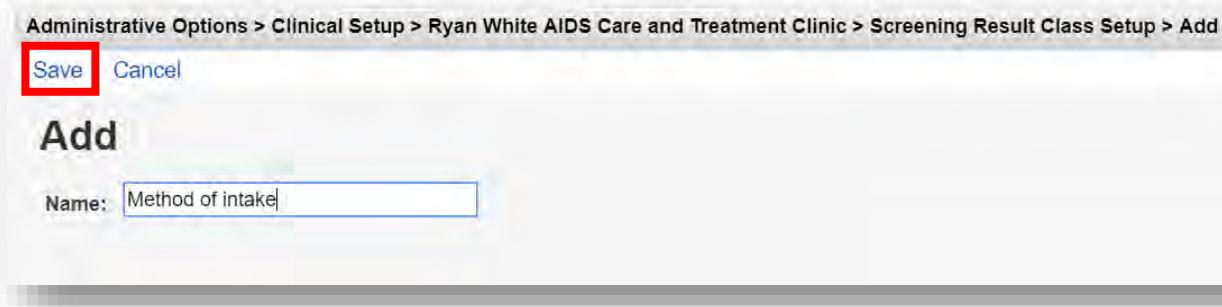
Edit View **Add** Edit Results Delete Back Print or Export

Screening Result Class Setup

Search:

Name	HRSA Defined
AdherenceScore	
analpapres	
appetite	
bowels	
Geno/Pheno	
Good_bad	
Housing Arrangement	X
HQ Adherence Rating	
HQ Substance Abuse Result	
HQ Tobacco Result	

8. Enter the **Name** for the **Screening Result Class**. Click **Save**.



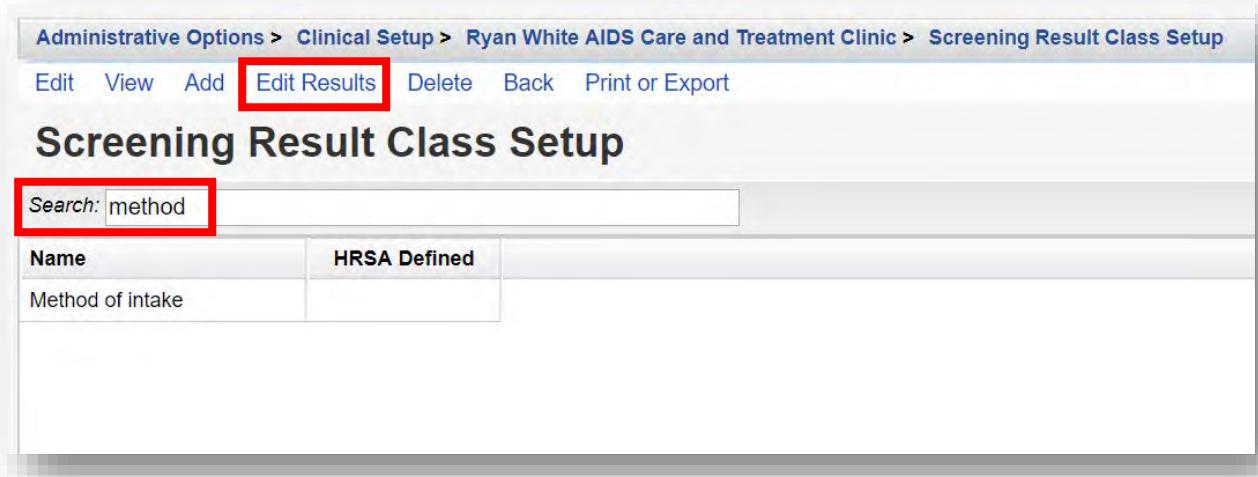
Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Result Class Setup > Add

Save Cancel

Add

Name:

9. To add a Result for *Method of intake*, type “method” into the Search field on the **Screening Result Class Setup** menu. Once found, select it, and click **Edit Results**.



Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Result Class Setup

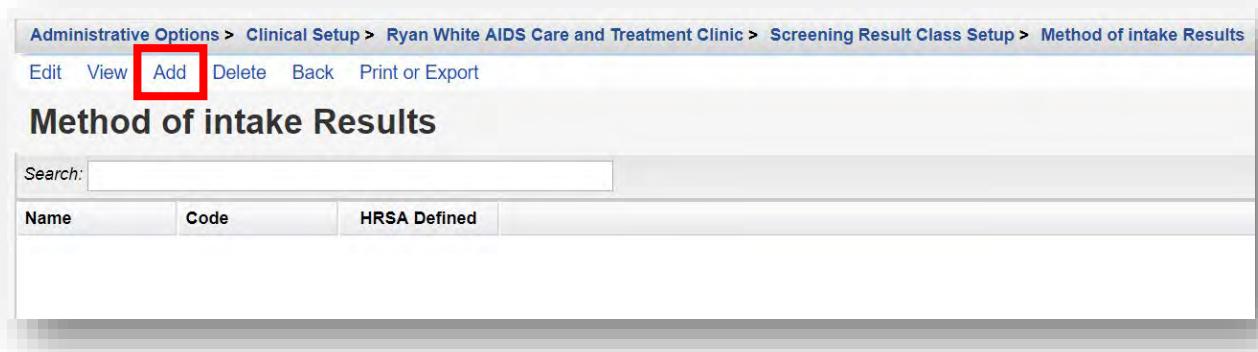
Edit View Add **Edit Results** Delete Back Print or Export

Screening Result Class Setup

Search:

Name	HRSA Defined
Method of intake	

10. On the Method of intake Results screen, select **Add**.



Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Result Class Setup > Method of intake Results

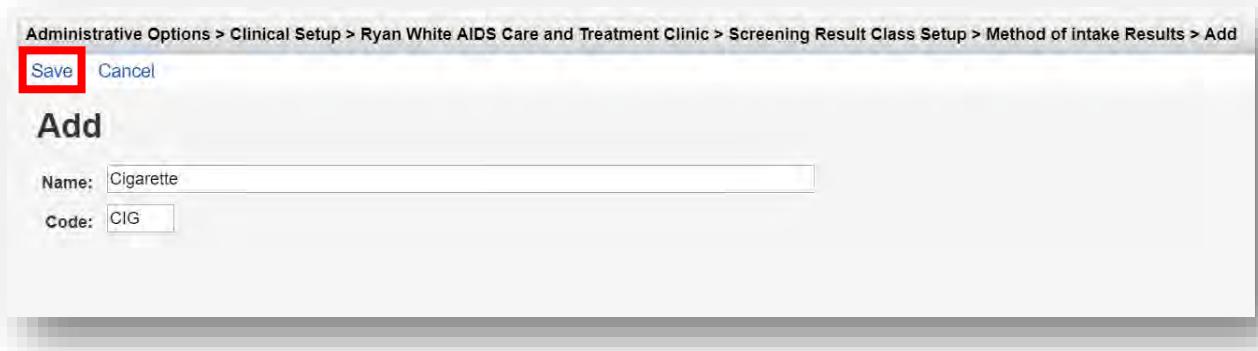
Edit View **Add** Delete Back Print or Export

Method of intake Results

Search:

Name	Code	HRSA Defined
------	------	--------------

11. Enter in the **Name** and **Code** (optional). For this example, we will create a result called *Cigarette (CIG)*. Click **Save**.



Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Result Class Setup > Method of intake Results > Add

Save Cancel

Add

Name:

Code:

12. The new result now appears on the Method of intake Results screen. To return to the **Manage Selected Provider** screen, click the name of the provider in the **breadcrumb trail** or click **Back**.

Administrative Options > Clinical Setup > **Ryan White AIDS Care and Treatment Clinic** > Screening Result Class Setup > Method of intake Results

Edit View Add Delete **Back** Print or Export

Method of intake Results

Search:		
Name	Code	HRSA Defined
Cigarette	CIG	

13. To add a new **Screening Action Class**, from the **Manage Selected Provider** screen, select **Screening Action Class setup**. If this option is not available, you may need to configure the Personal Menu Settings by clicking the gear icon next to the selected provider's name.

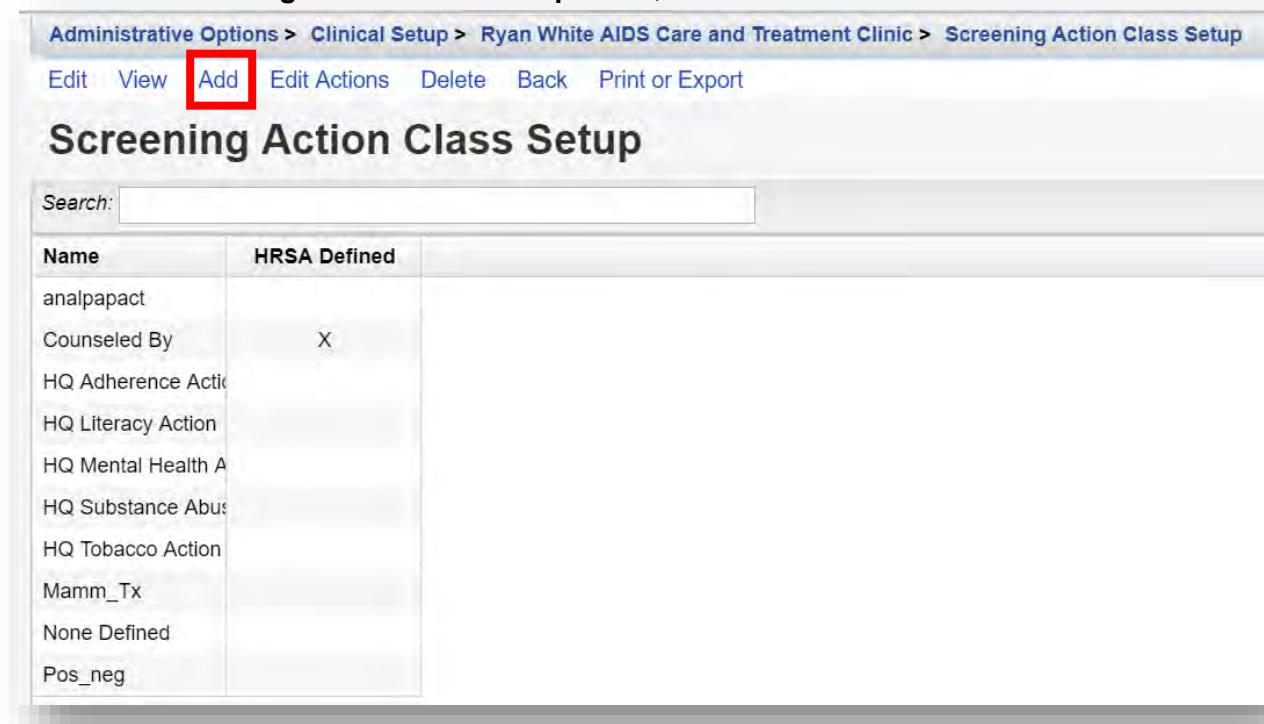
Administrative Options > Clinical Setup > **Ryan White AIDS Care and Treatment Clinic**

Back

→ **Ryan White AIDS Care and Treatment Clinic**

Lab Setup	31 / 33 Labs Activated
Screening Lab Setup	28 / 39 Screening Labs Activated
Screening Setup	34 / 49 Screenings Activated
Screening Action Class Setup	16 total Action Classes
Screening Result Class setup	31 total Result Classes
Immunization Setup	13 / 21 Immunizations activated
Medication Setup	76 / 498 medications activated
Medication Definitions File	Update the medications file or import new medications from the current file
Diagnosis Setup	43028 / 43028 Diagnosis definitions activated

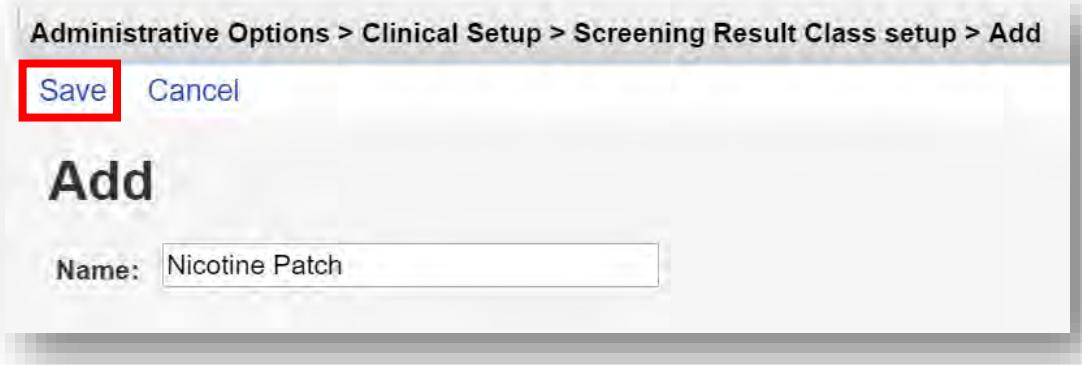
14. On the **Screening Action Class Setup** menu, select **Add**.



The screenshot shows a software interface for 'Screening Action Class Setup'. The top navigation bar includes 'Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Action Class Setup'. Below the navigation is a menu bar with 'Edit', 'View', 'Add' (which is highlighted with a red box), 'Edit Actions', 'Delete', 'Back', and 'Print or Export'. The main title 'Screening Action Class Setup' is centered above a search bar labeled 'Search:'. A table lists various screening actions, each with a 'HRSA Defined' column. The actions listed are: analpapact (X), Counseled By (X), HQ Adherence Action, HQ Literacy Action, HQ Mental Health A, HQ Substance Abus, HQ Tobacco Action, Mamm_Tx, None Defined, and Pos_neg.

Name	HRSA Defined
analpapact	
Counseled By	X
HQ Adherence Action	
HQ Literacy Action	
HQ Mental Health A	
HQ Substance Abus	
HQ Tobacco Action	
Mamm_Tx	
None Defined	
Pos_neg	

15. Enter the **Name** for the **Screening Action Class**. Click **Save**.



The screenshot shows a 'Add' screen for 'Screening Result Class setup'. The top navigation bar is 'Administrative Options > Clinical Setup > Screening Result Class setup > Add'. Below the navigation is a 'Save' button (which is highlighted with a red box) and a 'Cancel' button. The main area is titled 'Add' and contains a 'Name:' label followed by a text input field containing 'Nicotine Patch'.

16. The newly created custom Screening test is now setup and ready for use.

Find Client > Search Results > Demographics > Screenings > Add

Save Back

Add

Test Date:	4/9/2019	
Test Definition:	Tobacco Use	
Result:	Cigarette	
Action:	Nicotine Patch	
Test Score:	<input type="text"/>	

Immunization Setup

1. From the **Manage Selected Provider** screen, select **Immunization Setup**.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic

Back

Ryan White AIDS Care and Treatment Clinic

Lab Setup	31 / 33 Labs Activated
Screening Lab Setup	28 / 39 Screening Labs Activated
Screening Setup	34 / 49 Screenings Activated
Immunization Setup	13 / 21 Immunizations activated
Medication Setup	76 / 498 medications activated
Medication Definitions File	Update the medications file or import new medications from the current file
Diagnosis Setup	43028 / 43028 Diagnosis definitions activated

2. HRSA Defined Immunizations are clearly listed with an X under the HRSA column. In this example, four (4) immunizations are listed.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Immunization Setup

Edit View Add Delete Activate Deactivate Activate All Deactivate All Back Print or Export

Immunization Setup

Search:

Active	HRSA	Immunization
X	X	Hep A/Hep B (Twinrix)(1)
	X	Prevnar13
X	X	Hepatitis B (3)
	X	Hepatitis A (2)
X		Ebola

3. Enter the **Name** for the **Immunization**. Click **Save**.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Immunization Setup > Add

Save [Cancel](#)

Add

Immunization:

Diagnosis Setup

1. From the **Manage Selected Provider** screen, select **Diagnosis Setup**.

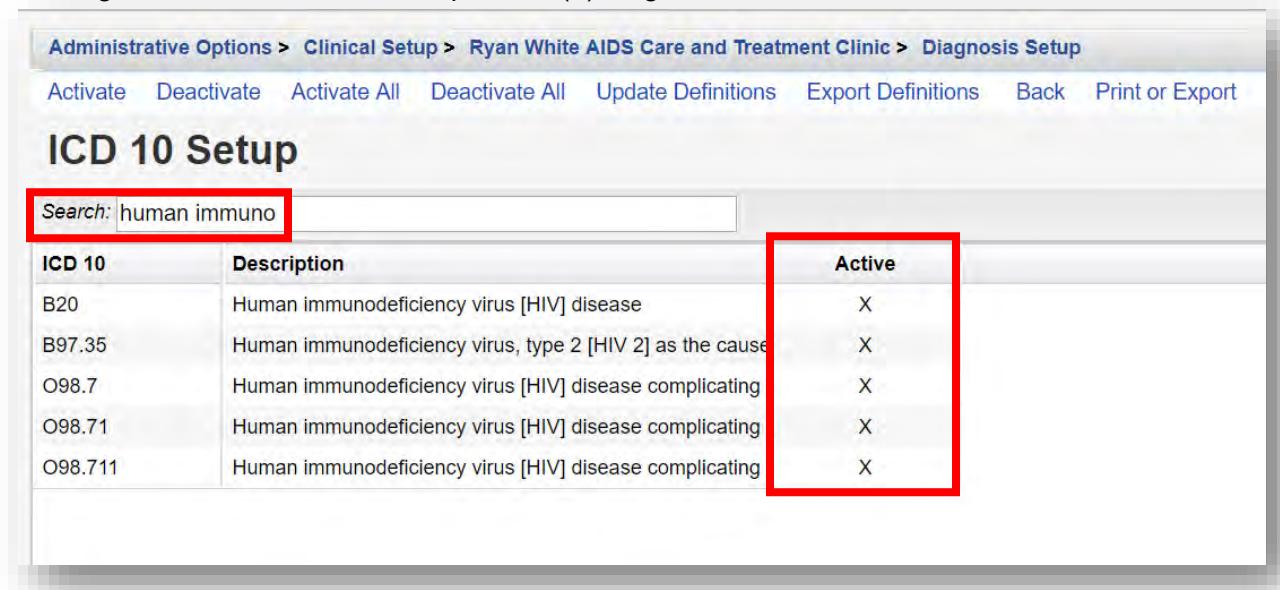
Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic

Back

Ryan White AIDS Care and Treatment Clinic

Lab Setup	31 / 33 Labs Activated
Screening Lab Setup	28 / 39 Screening Labs Activated
Screening Setup	34 / 49 Screenings Activated
Immunization Setup	13 / 21 Immunizations activated
Medication Setup	76 / 498 medications activated
Medication Definitions File	Update the medications file or import new medications from the current file
Diagnosis Setup	43028 / 43028 Diagnosis definitions activated

2. ICD-10 Diagnosis Codes and Descriptions are clearly listed with an X under the Active column. The phrase *human immuno* was entered into the Search box to filter the ICD-10 diagnosis results. In this example, five (5) diagnosis codes are listed.



Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Diagnosis Setup

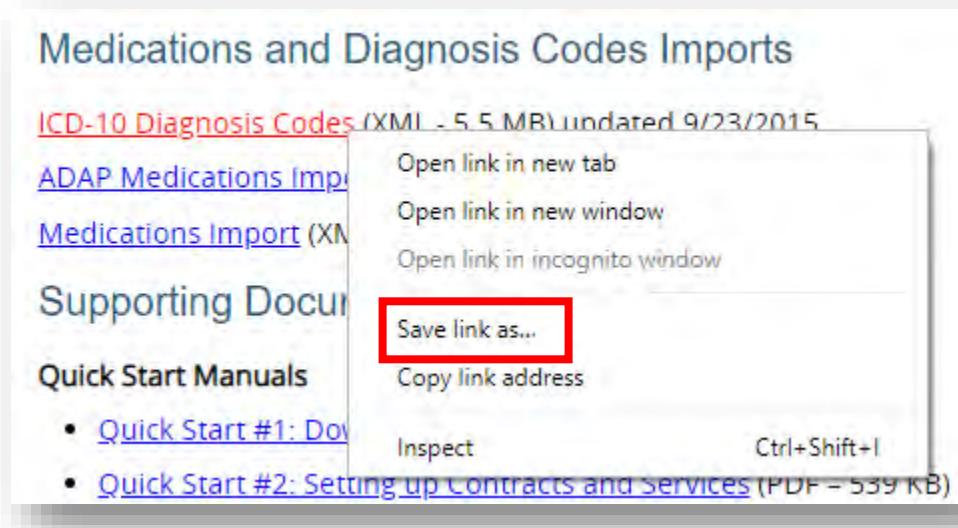
Activate Deactivate Activate All Deactivate All Update Definitions Export Definitions Back Print or Export

ICD 10 Setup

Search:

ICD 10	Description	Active
B20	Human immunodeficiency virus [HIV] disease	X
B97.35	Human immunodeficiency virus, type 2 [HIV 2] as the cause	X
O98.7	Human immunodeficiency virus [HIV] disease complicating	X
O98.71	Human immunodeficiency virus [HIV] disease complicating	X
O98.711	Human immunodeficiency virus [HIV] disease complicating	X

3. The current codes can be found on the HRSA CAREWare website: <https://hab.hrsa.gov/program-grants-management/careware>. On the website, find the ICD-10 Diagnosis Codes XML download link and **right click** on it. Select *Save target as...* or *Save link as...* and save the XML file somewhere on your local computer (a “CAREWare” user folder is recommended).



Medications and Diagnosis Codes Imports

[ICD-10 Diagnosis Codes](#) (XML - 5.5 MB) Updated 9/23/2015

[ADAP Medications Import](#)

[Medications Import](#) (XML)

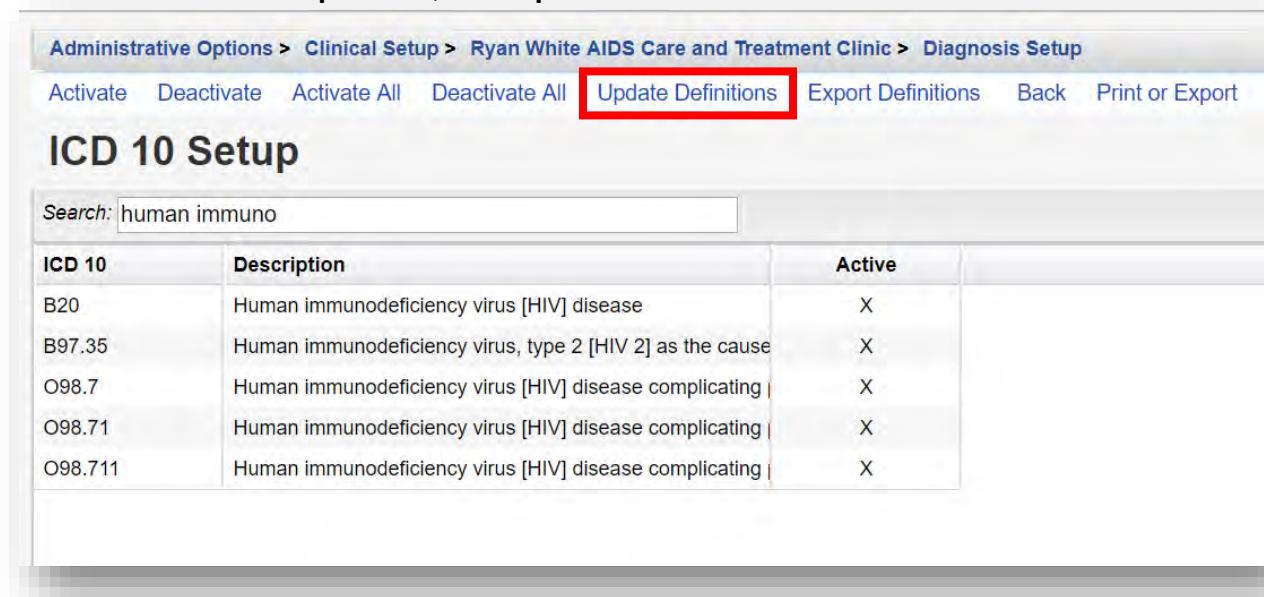
Supporting Documents

Quick Start Manuals

- [Quick Start #1: Doing Business with HRSA](#)
- [Quick Start #2: Setting up Contracts and Services](#) (PDF - 539 KB)

Open link in new tab
Open link in new window
Open link in incognito window
Save link as...
Copy link address

4. On the ICD 10 Setup screen, click **Update Definitions**.



Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Diagnosis Setup

Activate Deactivate Activate All Deactivate All **Update Definitions** Export Definitions Back Print or Export

ICD 10 Setup

Search: human immuno

ICD 10	Description	Active
B20	Human immunodeficiency virus [HIV] disease	X
B97.35	Human immunodeficiency virus, type 2 [HIV 2] as the cause	X
O98.7	Human immunodeficiency virus [HIV] disease complicating	X
O98.71	Human immunodeficiency virus [HIV] disease complicating	X
O98.711	Human immunodeficiency virus [HIV] disease complicating	X

5. Click **Choose File** from the **Update Definitions** screen and browse to the saved location of the **carewareicd10.xml** file. Once you receive the **Upload Completed Successfully** message, click **Save**.



Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Diagnosis Setup

Save Cancel

Update Definitions

File Name: **Choose File** carewareicd10.xml

Deactivate all ICD 10s that are not contained in the file:

Upload Completed Successfully. (5.5 MB of 5.5 MB)

Diagnoses must be designated as active to be used. When “*Deactivate all ICD 10s that are not contained in the file*” is checked, any diagnosis that are not in the Updated Definitions file will automatically be deactivated. They will not be deleted but would need to be manually activated to be used.

Medication Setup

1. From the **Manage Selected Provider** screen, select **Medication Setup**.



Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic

Back

Ryan White AIDS Care and Treatment Clinic

Lab Setup	31 / 33 Labs Activated
Screening Lab Setup	28 / 39 Screening Labs Activated
Screening Setup	34 / 49 Screenings Activated
Immunization Setup	13 / 21 Immunizations activated
Medication Setup	76 / 498 medications activated
Medication Definitions File	Update the medications file or import new medications from the current file
Diagnosis Setup	43028 / 43028 Diagnosis definitions activated

2. Medications are clearly listed with an X under the Active column. In this example, five (5) medications are listed. Medications are listed by ingredient or generic name(s).

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Medication Setup

[Edit](#) [View](#) [Activate](#) [Deactivate](#) [Activate All](#) [Deactivate All](#) [Delete](#) [Back](#) [Print or Export](#)

Medication Setup

Search:

Active	Medication	Custom Name
X	amprenavir	Agenerase
X	lamivudine-zidovudine	Combivir
X	indinavir	Crixivan
X	lamivudine	Epivir
X	Fortovase (saquinavir mesylate)	Fortovase

3. To add a Custom or Brand name to an active Medication name, click **Edit** (see previous screenshot).
4. Enter a Custom Name. In this example we entered *Ziagen*. Select **Save**.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Medication Setup > Edit

Save **Cancel**

Edit

Medication: abacavir

Custom Name: Ziagen (abacavir)



NOTE: It is recommended to include the medication name (ingredient or generic) after the custom name.

Medication Definitions File

1. From the **Manage Selected Provider** screen, select **Medication Definitions File**.



Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic

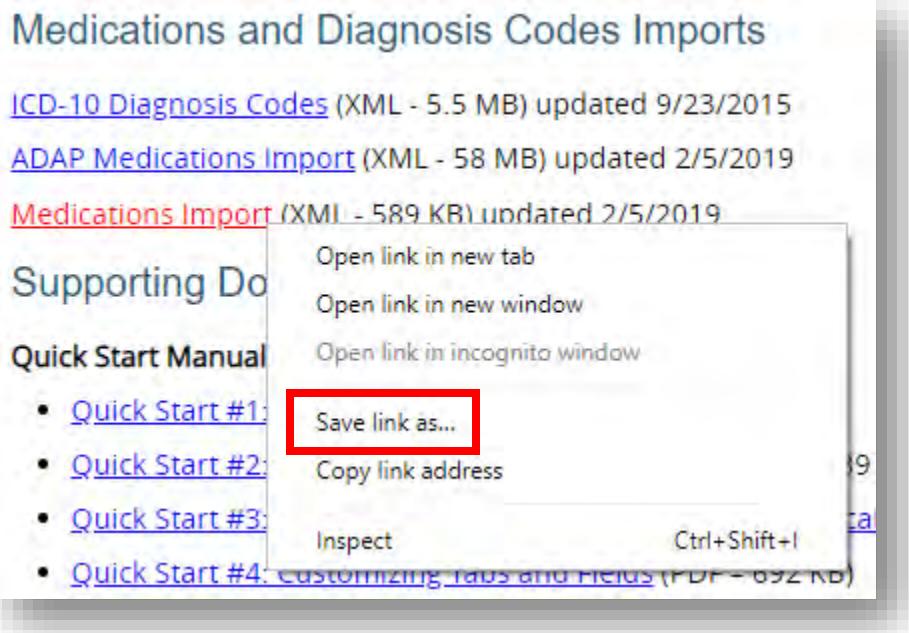
Back

Ryan White AIDS Care and Treatment Clinic

Lab Setup	31 / 33 Labs Activated
Screening Lab Setup	28 / 39 Screening Labs Activated
Screening Setup	34 / 49 Screenings Activated
Immunization Setup	13 / 21 Immunizations activated
Medication Setup	76 / 498 medications activated
Medication Definitions File	Update the medications file or import new medications from the current file
Diagnosis Setup	43028 / 43028 Diagnosis definitions activated

2. Current Medications should be imported into CAREWare on a regular basis. The current medications can be found on the HRSA CAREWare website: <https://hab.hrsa.gov/program-grants-management/careware>

3. On the website, find the Medications Import XML download link and **right click** on it. Select *Save target as...* or *Save link as...* and save the XML file somewhere on your local computer (a “CAREWare” user folder is recommended).



4. On the Medication Import screen, click **Upload New Medication File**.

The screenshot shows the 'Medication Import' screen. The 'Upload New Medication File' button is highlighted with a red box. The page includes a navigation bar with 'Import', 'Import All', 'Upload New Medication File', 'Back', and 'Print or Export' buttons. A search bar is at the top, and a table below lists medication definitions.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Medication Definitions File

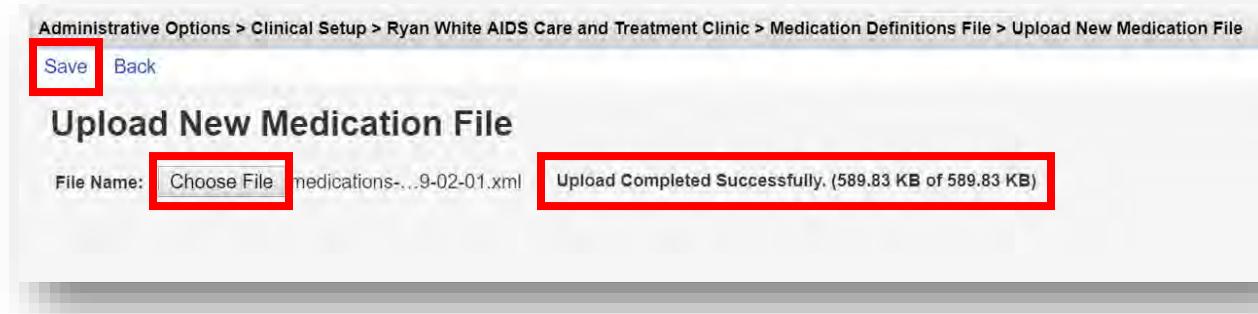
Import Import All **Upload New Medication File** Back Print or Export

Medication Import

Search:

DCode	Active Ingredients	Abbreviation
d00554	hydroxyprogesterone	
d00555	norethindrone	
d00557	levonorgestrel	
d00558	testosterone	
d00562	fluoxymesterone	

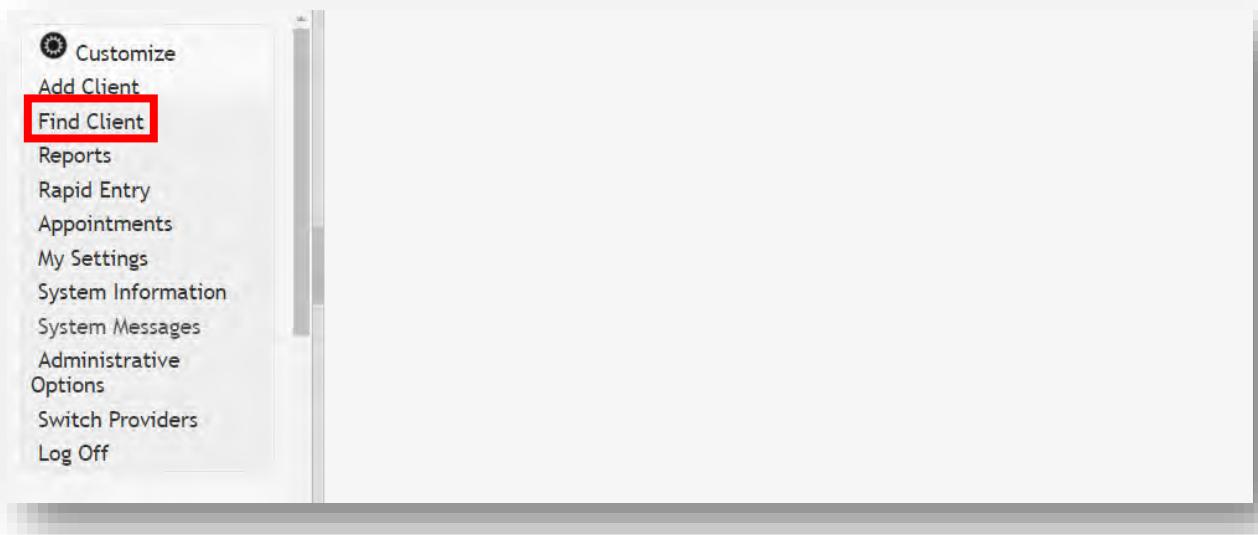
5. Click **Choose File** and browse to the saved location of the **medications-(year-month-day).xml** file. Once you receive the Upload Completed Successfully message, click **Save**.



Entering Clinical Data

After setup of the Clinical Module is completed, clinical data entry can begin.

1. Select **Find Client** from the **Menu of Links** of a provider domain. Note: All data-entry must be entered in a Provider domain.



2. Search by any of the available fields; in this case we'll use the last name. Click **Client Search**.

Find Client

Client Search

Find Client

Last Name:

First Name:

DOB: 

ClientID:

URNorEURN:

Encrypted UCI:

Active Only:

Ethnicity: 

3. A list of matches to your search appears. Select the correct name from the list and click **View Details**. The client Demographics information window appears.

Find Client > Search Results

View Details [Custom Forms](#) [Back](#) [Print or Export](#)

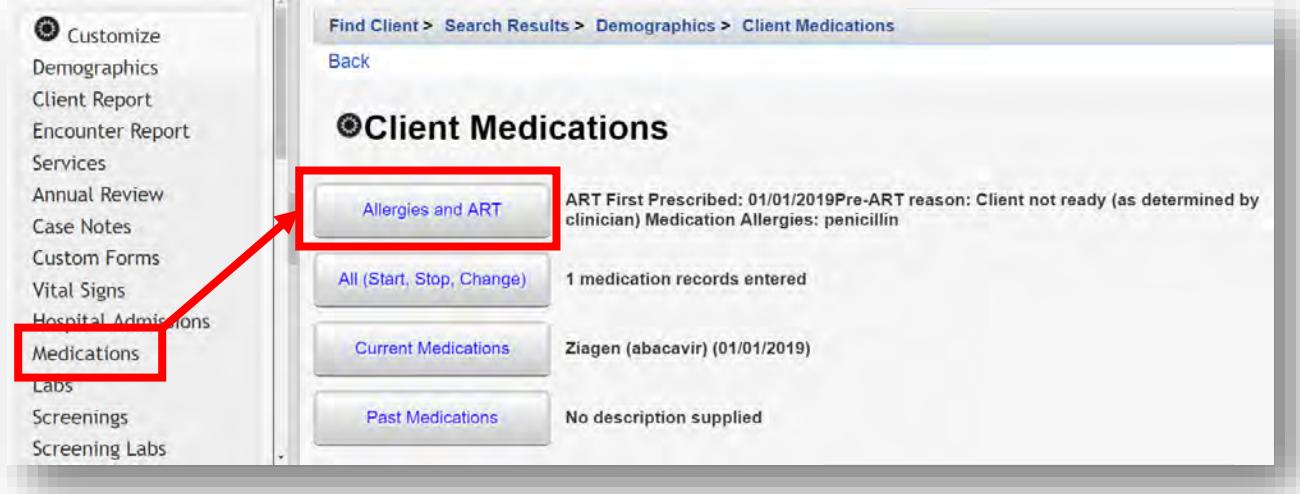
Search Results

Search:

Last Name	First Name	Client ID	URN	EURN	Encrypted UCI	Match Type
Appleseed	John		JHAP0105851U	XqYSZJ4bI	ECA88A4A1FE6589	Exact
Appleseed	Johnny	EMR123	JHAP1205651U	T+oN+bI1n	8A30545F3C06276	Exact
Appleseed	Martha		MRAP0507784U	HN+keK2Qa	1A6A4DF54CAB24I	Exact

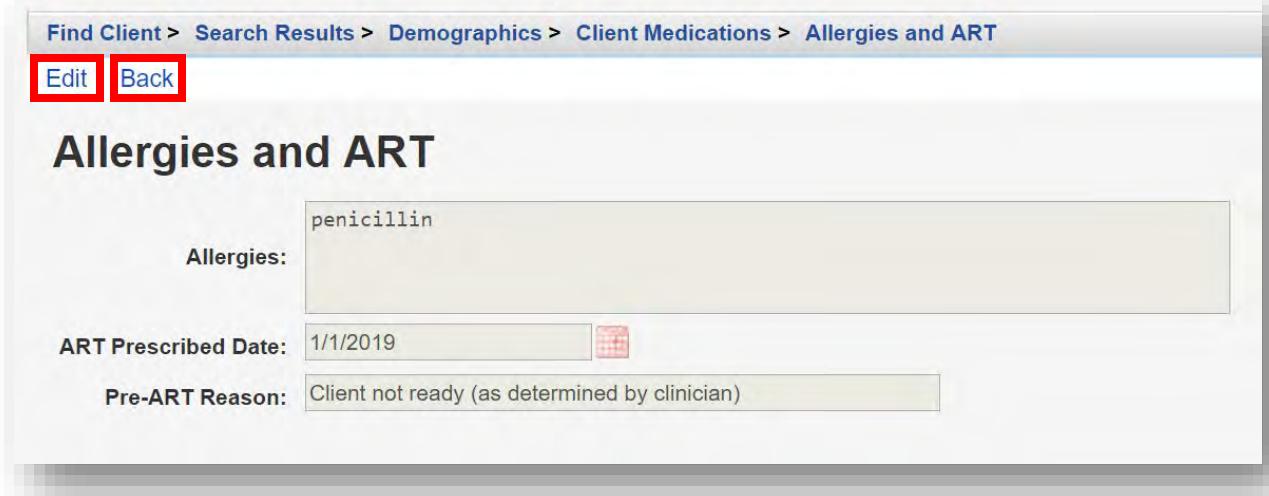
Medications

1. From the Demographics screen, select **Medications** from the **Menu of Links**.
2. Select **Allergies and ART**.



The screenshot shows the 'Client Medications' screen. On the left is a sidebar with various links: 'Customize', 'Demographics' (which is the current page), 'Client Report', 'Encounter Report', 'Services', 'Annual Review', 'Case Notes', 'Custom Forms', 'Vital Signs', 'Hospital Admissions', 'Medications' (which is highlighted with a red box), 'Labs', 'Screenings', and 'Screening Labs'. On the right, the main area shows the title 'Client Medications'. Below it are four buttons: 'Allergies and ART' (which is highlighted with a red box), 'All (Start, Stop, Change)', 'Current Medications' (showing 'Ziagen (abacavir) (01/01/2019)'), and 'Past Medications' (showing 'No description supplied'). At the top of the main area, the path 'Find Client > Search Results > Demographics > Client Medications' is displayed, along with 'Back' and 'ART First Prescribed: 01/01/2019 Pre-ART reason: Client not ready (as determined by clinician) Medication Allergies: penicillin'.

3. Select **Edit** to enter allergies and ART information.



The screenshot shows the 'Allergies and ART' screen. At the top, the path 'Find Client > Search Results > Demographics > Client Medications > Allergies and ART' is shown, along with 'Edit' and 'Back' buttons (the 'Edit' button is highlighted with a red box). The main area has three input fields: 'Allergies:' with 'penicillin' typed in, 'ART Prescribed Date:' with '1/1/2019' and a calendar icon, and 'Pre-ART Reason:' with 'Client not ready (as determined by clinician)'.

4. After making the desired edits, click **Save** and then **Back** (see previous screenshot) to return to the **Client Medications** screen.

Find Client > Search Results > Demographics > Client Medications > Allergies and ART > Edit

Save **Cancel**

Allergies and ART

Allergies: penicillin

ART Prescribed Date: 1/1/2019

Pre-ART Reason: Client not ready (as determined by clinician)

5. From the **Client Medications** screen, select **All (Start, Stop, Change)**.

Find Client > Search Results > Demographics > Client Medications

Back

Client Medications

Allergies and ART

ART First Prescribed: 01/01/2019 Pre-ART reason: Client not ready (as determined by clinician) Medication Allergies: penicillin

All (Start, Stop, Change)

1 medication records entered

Current Medications Ziagen (abacavir) (01/01/2019)

Past Medications No description supplied

6. Select **Start** to enter a new client medication.

The screenshot shows a software interface for managing client medications. The top navigation bar includes links: Find Client, Search Results, Demographics, Client Medications, and All (Start, Stop, Change). Below the navigation is a menu bar with View, Start (which is highlighted with a red box), Start Regimen, Stop, Delete, Back, and Print or Export. The main title is 'All Medications'. A search bar is present. A table lists medications with columns: Medication Name, Abbreviation, Form, Units, Strength (mg), and Dose. One row is shown: Ziagen (abacavir) with ABC as the abbreviation, 30 as the units, 15 as the strength, and 450 as the dose.

7. Enter the following information (as applicable):

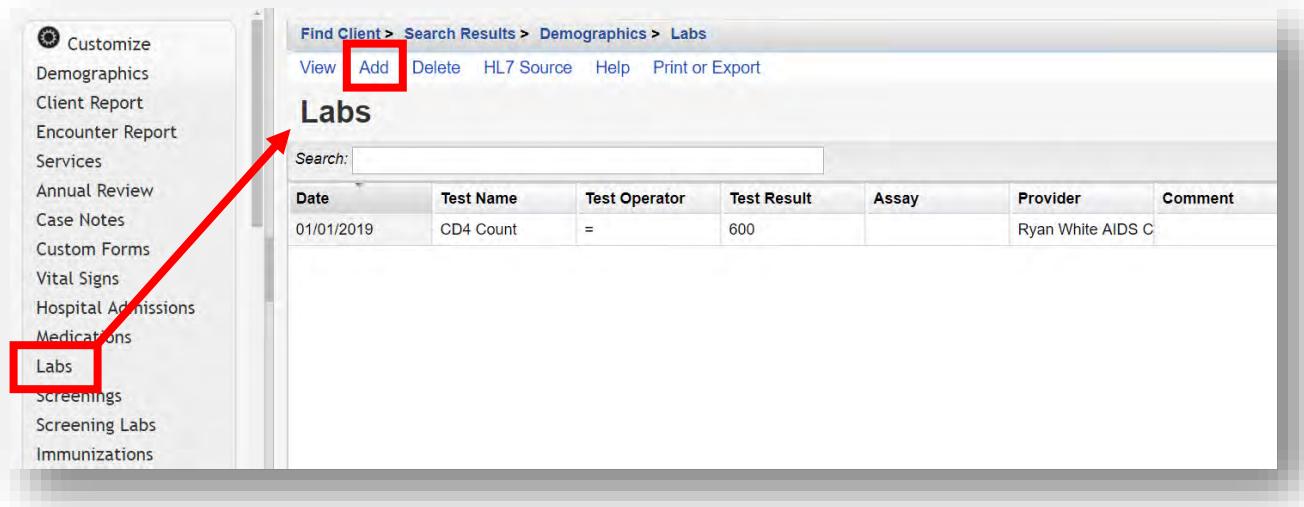
- **Start Date**
- **Medication Name** – enter the first few letters of the medication to filter results
- **Units** – number of days of the prescription, (30-day or 90-day)
- **Form** – type, capsule, tablet, etc. (optional)
- **Strength** – in milligrams
- **Frequency** – once a day, twice a day, etc.
- **Indication** – reason the medication is prescribed. The default indication is ART (Anti-retroviral Therapy)
- **OI** – opportunistic infection (as applicable)
- **Comment** – optional
- **Instructions** – optional

The screenshot shows the 'Start' configuration screen. The top navigation bar is identical to the previous screenshot. The 'Save' and 'Back' buttons are highlighted with a red box. The main area is titled 'Start' and contains the following fields: Start Date (with a calendar icon), Medication Name (with a search icon), Units, Form (with a dropdown arrow), Strength (with a unit 'mg' and a search icon), Frequency (with a search icon), Indication (with a dropdown arrow), OI (with a search icon), Comment, and Instructions.

8. Click **Save**, then **Back**.

Labs

1. From the Demographics screen, select **Labs** from the **Menu of Links**. On the **Labs** screen, click **Add**.



Find Client > Search Results > Demographics > Labs

View Add Delete HL7 Source Help Print or Export

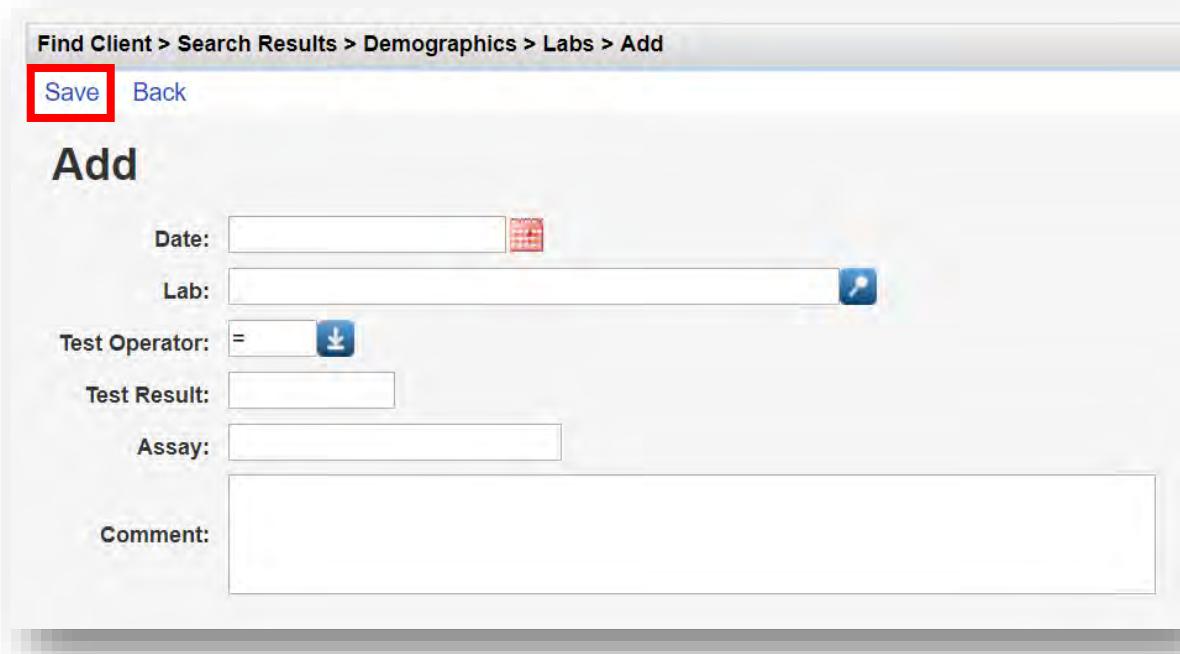
Labs

Search:

Date	Test Name	Test Operator	Test Result	Assay	Provider	Comment
01/01/2019	CD4 Count	=	600		Ryan White AIDS C	

2. Enter the following information (as applicable) and then click **Save**.

- **Date**
- **Lab**
- **Test Operator**
- **Test Result**
- **Assay**
- **Comment**



Find Client > Search Results > Demographics > Labs > Add

Save Back

Add

Date: 

Lab: 

Test Operator: = 

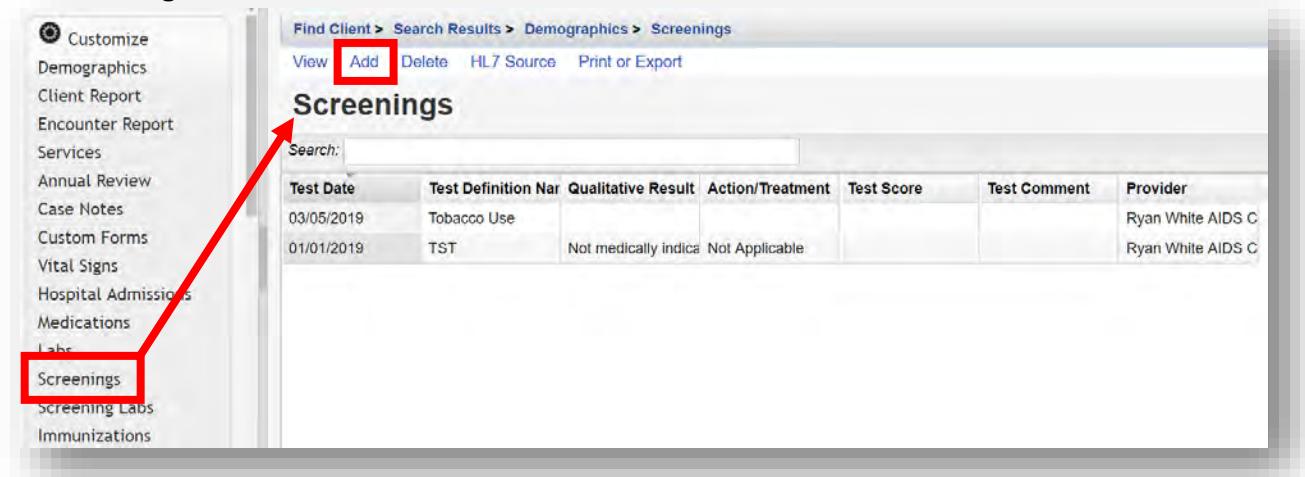
Test Result:

Assay: 

Comment:

Screenings

1. From the Demographics screen, select **Screenings** from the **Menu of Links**. On the **Screenings** screen, click **Add**.



Find Client > Search Results > Demographics > Screenings

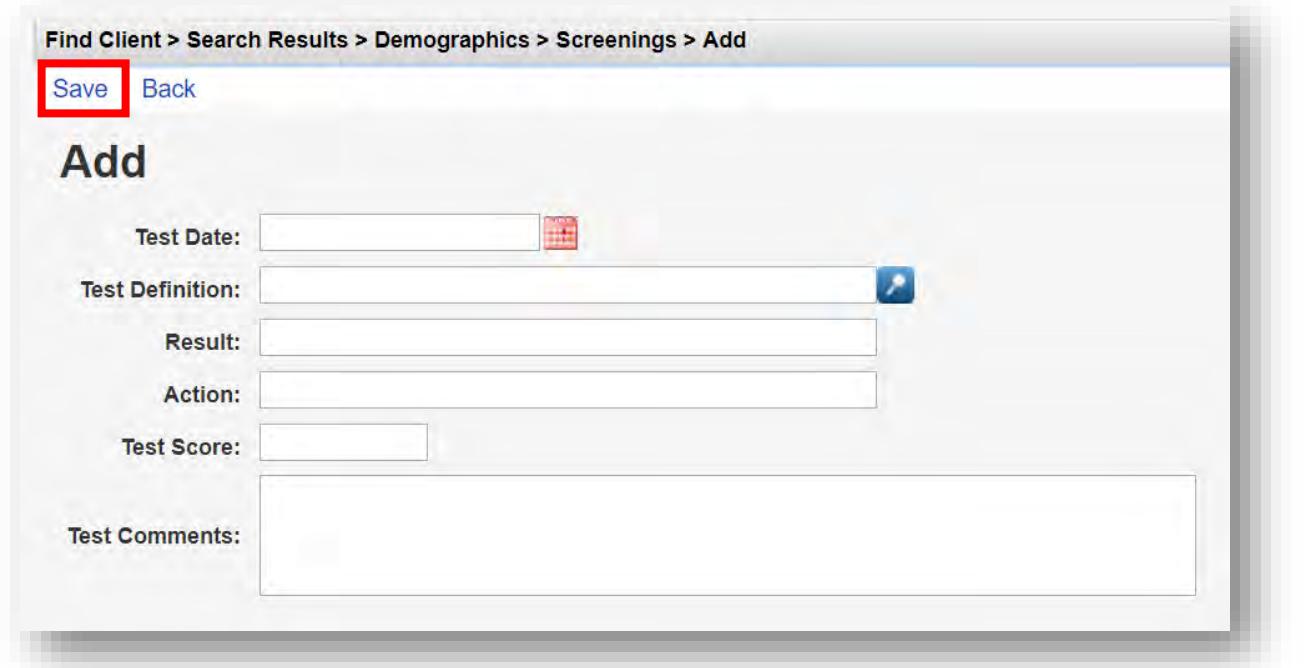
View Add Delete HL7 Source Print or Export

Screenings

Test Date	Test Definition Nar	Qualitative Result	Action/Treatment	Test Score	Test Comment	Provider
03/05/2019	Tobacco Use					Ryan White AIDS C
01/01/2019	TST	Not medically indica	Not Applicable			Ryan White AIDS C

2. Enter the following information (as applicable) and then click **Save**.

- **Test Date**
- **Test Definition**, (TST - TB skin test)
- **Result**
- **Action**
- **Test Score**
- **Test Comments**



Find Client > Search Results > Demographics > Screenings > Add

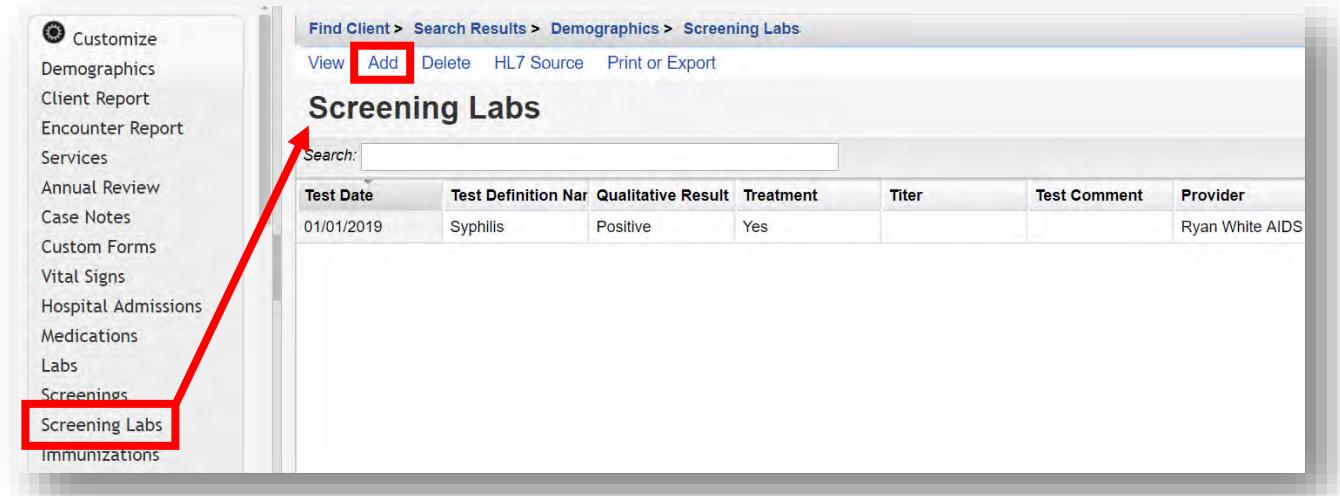
Save Back

Add

Test Date:	<input type="text"/>	
Test Definition:	<input type="text"/>	
Result:	<input type="text"/>	
Action:	<input type="text"/>	
Test Score:	<input type="text"/>	
Test Comments:	<input type="text"/>	

Screening Lab

1. From the Demographics screen, select **Screening Labs** from the **Menu of Links**. On the **Screening Labs** screen, click **Add**.



Find Client > Search Results > Demographics > Screening Labs

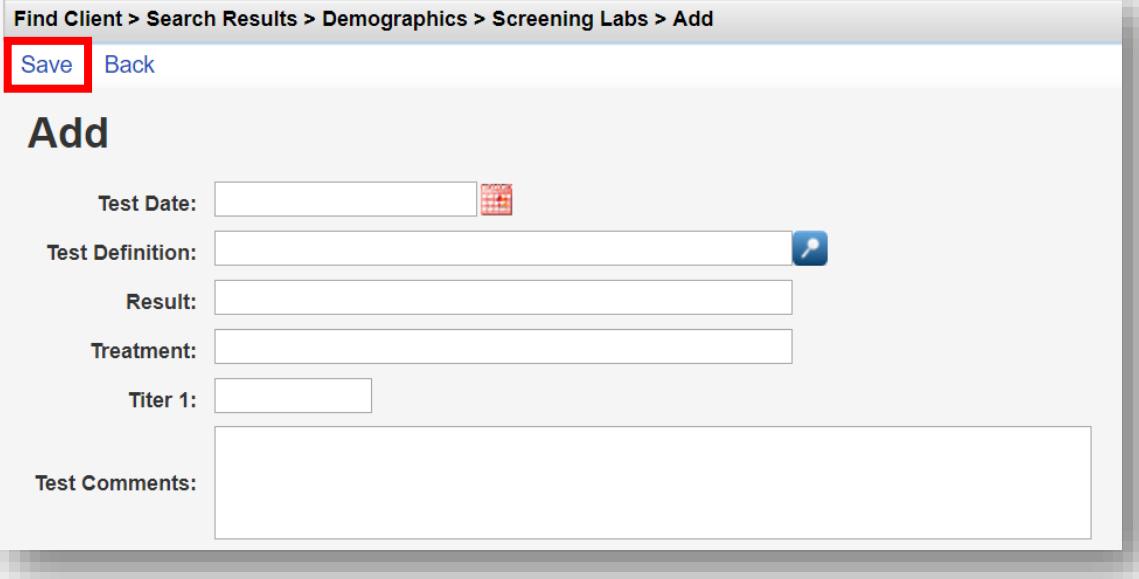
View Add Delete HL7 Source Print or Export

Screening Labs

Test Date	Test Definition Nar	Qualitative Result	Treatment	Titer	Test Comment	Provider
01/01/2019	Syphilis	Positive	Yes			Ryan White AIDS

2. Enter the following information (as applicable) and then click **Save**.

- **Test Date**
- **Test Definition**
- **Result**
- **Treatment**
- **Titer 1**
- **Test Comments**



Find Client > Search Results > Demographics > Screening Labs > Add

Save Back

Add

Test Date:	<input type="text"/>
Test Definition:	<input type="text"/>
Result:	<input type="text"/>
Treatment:	<input type="text"/>
Titer 1:	<input type="text"/>
Test Comments:	<input type="text"/>

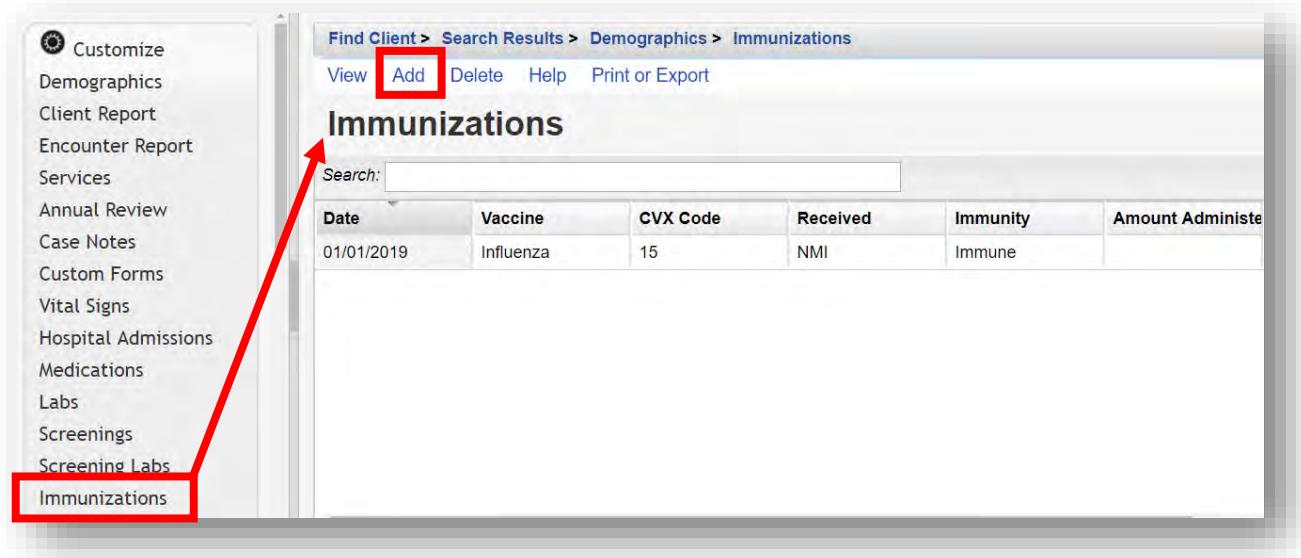


NOTE: The **Titer 1** field will be displayed for tests where titer is indicated (e.g. syphilis). The viral titer is the lowest concentration of a virus that still infects cells.

For the **Result** field, Not Medically Indicated (NMI) is often selected from the drop-down menu for hepatitis tests to show that the client has already been exposed to the virus; this prevents your reports from counting these clients as not having been tested for hepatitis.

Immunizations

1. From the Demographics screen, select **Immunizations** from the **Menu of Links**. On the **Immunizations** screen, click **Add**.



2. Enter the following information (as applicable) and then click **Save**.

- **Date**
- **Vaccine**
- **Received**
- **Immunity**
- **Amount Administered**
- **Units Administered**
- **Lot Number**
- **Manufacturer Name**
- **Manufacturer Code**

Find Client > Search Results > Demographics > Immunizations > Add

Save [Back](#)

Add

Date:	<input type="text"/>	
Vaccine:	<input type="text"/>	
CVX Code:	<input type="text"/>	
Received:	<input type="text"/>	
Immunity:	<input type="text"/>	
Amount Administered:	<input type="text"/>	
Units Administered:	<input type="text"/>	
Lot Number:	<input type="text"/>	
Manufacturer Name:	<input type="text"/>	
Manufacturer Code:	<input type="text"/>	

There are often cases where a client has either been vaccinated prior to entering your care (hepatitis, pneumovax) or has already been exposed and requires no vaccination. In these cases you would select “NMI” under **Received** and “History of immunization” or “History of vaccination” under **Immunity**.

Note: Additional clinical information, including, **Vital Signs**, **Hospital Admissions**, and **Orders** (clinical appointments), can be collected in CAREWare. They are entered the same way as Medications, Labs, Screenings, Screening Labs, and Immunizations.

However, this information is not required for the RSR Report or HAB Performance Measures, so it is optional and will not be detailed here.

CAREWare 6



Section 6:

**Working with Prebuilt Reports
(Including the RSR and ADR)**

Adapted from HRSA Quick Start User Guides:
<https://hab.hrsa.gov/program-grants-management/careware>

PLEASE NOTE: The client data used in these manuals is purely fictional.

First Things First

Getting Started

- You must have the appropriate user privileges to run reports.
- You should have a number of clients entered in the system so you can see how your reports will look.

Running “Prebuilt” reports

CAREWare comes prepackaged with several summary and service reports. We'll cover a few of them here, and then look at running the RSR for both reporting and quality assurance purposes.

Custom reports are covered in Quick Start Guides #7 and #8.

1. Log into CAREWare. For more details on how to do so, please refer to the **Quick Start Guide #1**.



NOTE: Some pre-built reports can only be run from the Central Admin and vice-versa. i.e. WICY report (Central); Mailing Labels (Provider).

2. Select **Reports** from the **Menu of Links**. The various report categories will appear.



Running HRSA Reports

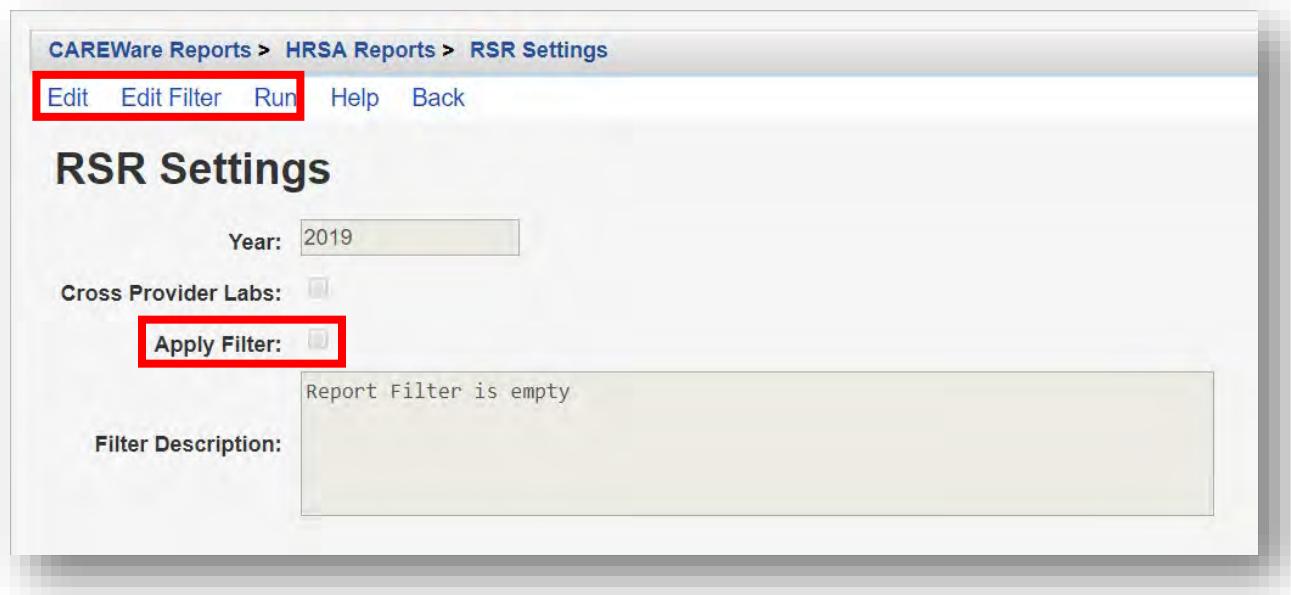
1. From the CAREWare Reports screen, click **HRSA Reports**.



2. Select **RSR Client Report**. (From the Provider domain, select **Export Menu**, then **RSR Export**.)



3. If necessary, change the **Report Year** by clicking **Edit**. To edit Filters, click **Edit Filter** and then check **Apply Filter**. Once complete, click **Run**.



CAREWare Reports > HRSA Reports > RSR Settings

Year: 2019

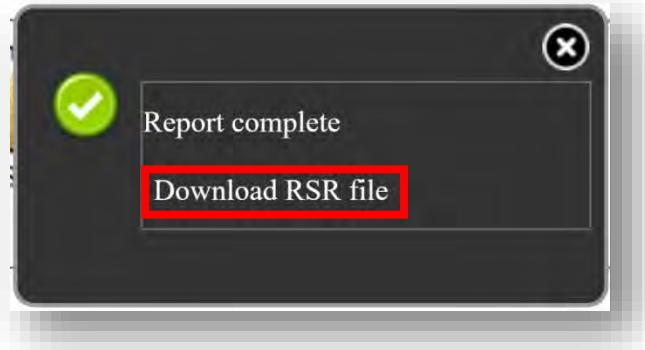
Cross Provider Labs:

Apply Filter:

Report Filter is empty

Filter Description:

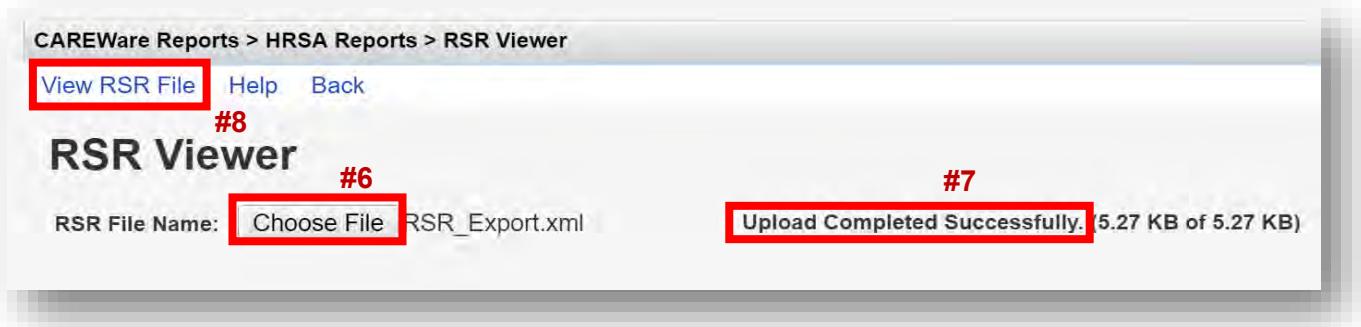
4. Click **Download RSR file**. Select a location on your local computer to save the *RSR_Export.xml* file. Note: It is recommended to save the RSR file to the computer Desktop for easy retrieval, as it is used in the next step.



5. Return to the CAREWare Reports screen and click **HRSA Reports**, and then click **RSR Viewer**.



6. Click on **Choose File**.
7. Select the *RSR_Export.xml* file saved on your local computer in step #4. Once chosen, the message **Upload Completed Successfully** should appear.
8. Select **View RSR File**.

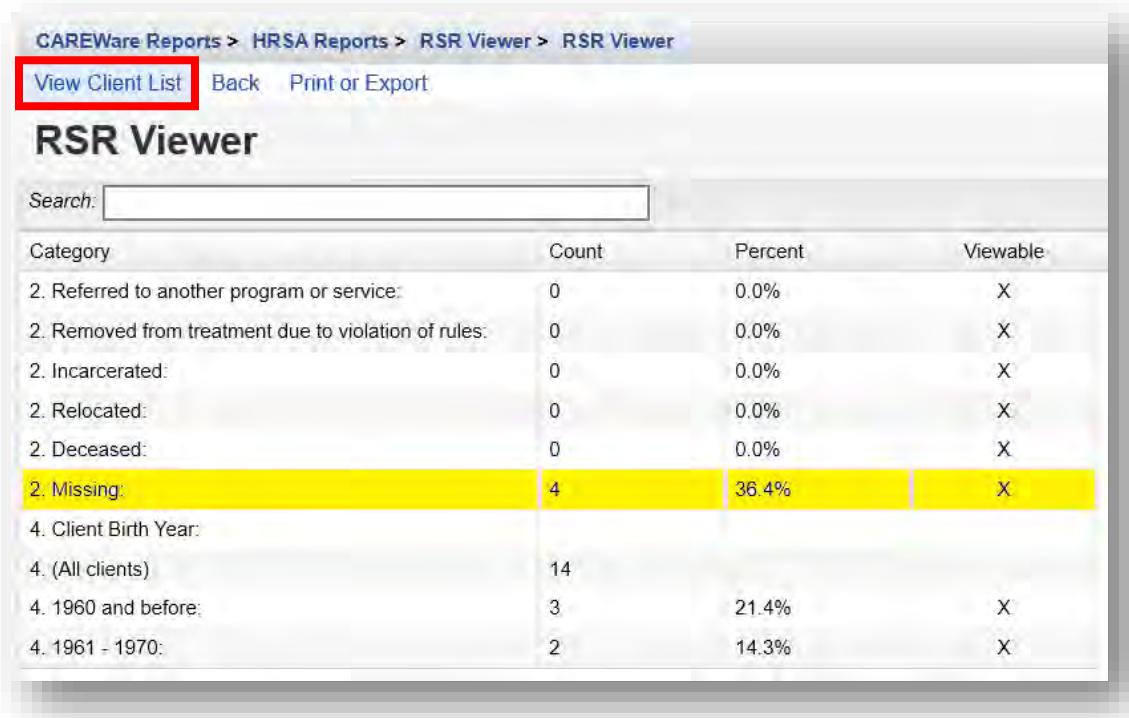


The RSR Report is displayed, with *Category*, *Count*, *Percent*, and *Viewable* columns. The *Category* column contains each HRSA RSR data field with a number listed to the left, which corresponds to the HRSA RSR required client-level data element.



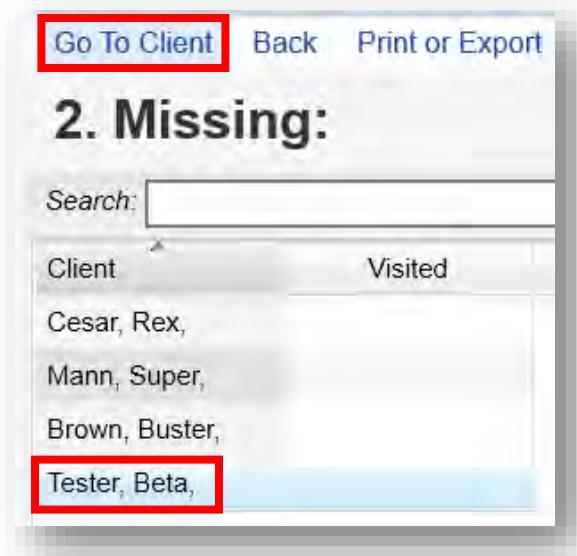
TIP: The RSR Report should also be used throughout the year, to identify and correct client data fields that are Missing, Unknown, or Out of Compliance with HRSA RSR data requirements.

9. In this example, on page 2 of the RSR Viewer, for the Category **2. Missing**, the Count shows 4. This indicates there are four (4) clients that are missing #2 – Enrollment Status. Select the 2. Missing row by clicking on it, and then click **View Client List**.



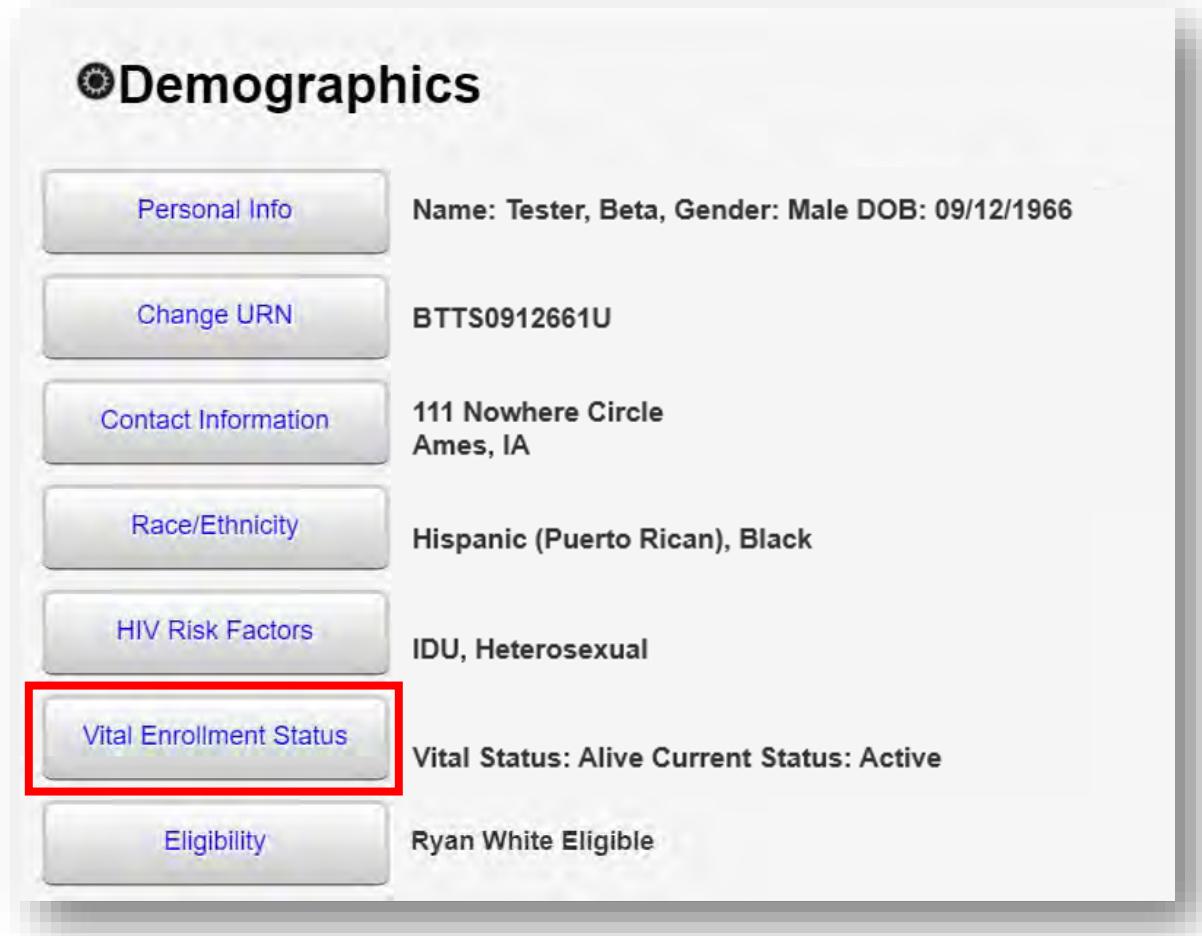
CAREWare Reports > HRSA Reports > RSR Viewer > RSR Viewer			
View Client List Back Print or Export			
RSR Viewer			
Search: <input type="text"/>			
Category	Count	Percent	Viewable
2. Referred to another program or service:	0	0.0%	X
2. Removed from treatment due to violation of rules:	0	0.0%	X
2. Incarcerated:	0	0.0%	X
2. Relocated:	0	0.0%	X
2. Deceased:	0	0.0%	X
2. Missing:	4	36.4%	X
4. Client Birth Year:			
4. (All clients)	14		
4. 1960 and before:	3	21.4%	X
4. 1961 - 1970:	2	14.3%	X

10. The four clients missing Enrollment Status are listed. Select a client by clicking on their name and click **Go To Client** or double-click the client's name. CAREWare performs a real-client lookup and opens the client record with the missing data automatically.



2. Missing:	
Search: <input type="text"/>	
Client	Visited
Cesar, Rex,	
Mann, Super,	
Brown, Buster,	
Tester, Beta,	

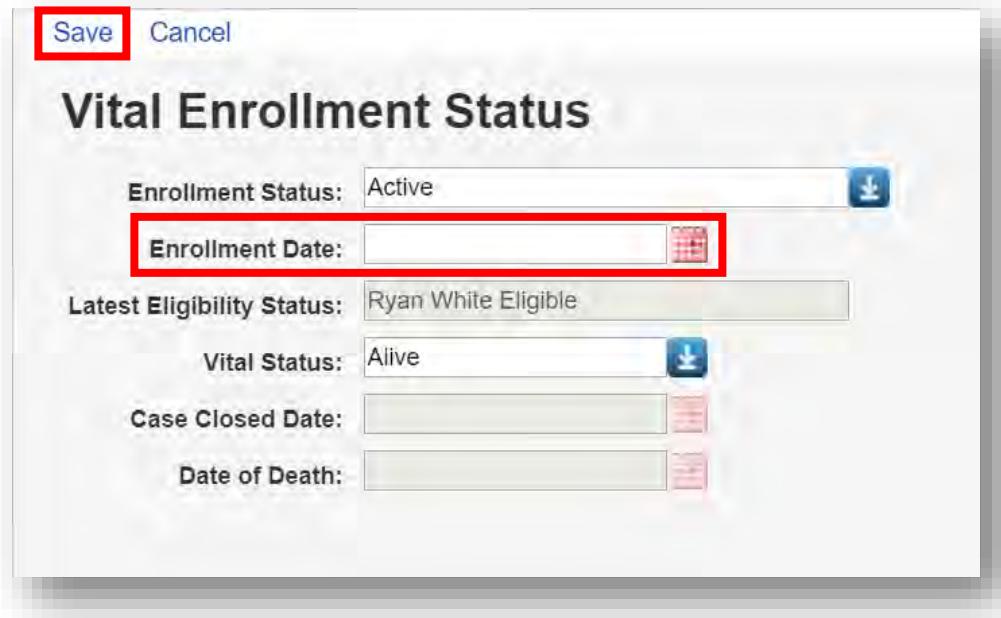
11. A new tab will open and the client's Demographic screen will appear. For this example, client "Tester, Beta" was selected. Click on **Vital Enrollment Status** from the Demographics Menu List.



Demographics

Personal Info	Name: Tester, Beta, Gender: Male DOB: 09/12/1966
Change URN	BTTS0912661U
Contact Information	111 Nowhere Circle Ames, IA
Race/Ethnicity	Hispanic (Puerto Rican), Black
HIV Risk Factors	IDU, Heterosexual
Vital Enrollment Status	Vital Status: Alive Current Status: Active
Eligibility	Ryan White Eligible

12. The Enrollment Date field is null (blank). A valid enrollment date needs to be entered to correct the missing data field. Once complete, click **Save**.



The screenshot shows a software interface titled "Vital Enrollment Status". At the top, there are "Save" and "Cancel" buttons, with "Save" being highlighted by a red box. Below the buttons, the form fields are listed: "Enrollment Status" (Active), "Enrollment Date" (highlighted by a red box), "Latest Eligibility Status" (Ryan White Eligible), "Vital Status" (Alive), "Case Closed Date" (highlighted by a red box), and "Date of Death" (highlighted by a red box). Each field has a small blue download icon to its right.

Check all the remaining RSR Report Categories and Columns for Missing, Unknown, and Out of Compliance data values, including, Demographic and Clinical information. Review all Categories to check program data accuracy.



NOTE: Remember to rerun the RSR Client Report to include any changes made to the client record(s) in CAREWare.

Running Client Data Reports

The following Client Data Reports are available to you within CAREWare 6:

- Clinical Encounter Reports – Run clinical encounter reports
 - **Clients with no encounter in X days** – Clients who have not had an encounter in the last specified number of days
 - **No Service in X days Report** – List clients who have not received a service in a specified category or a particular subservice within the specified number of days
 - **Clients with no test in X days** – Clients who have not had the specified screening test in the specified number of days
 - **Clients with last selected lab result** – Clients whose last selected lab result was less than or greater than the specified result
 - **ARV Ingredient Report** – Displays ARV ingredient counts for active HIV-positive clients on the specified date
 - **Clients with no Hepatitis vaccinations** – Clients who have not had a vaccination for a specified hepatitis virus
 - **Clients ever diagnosed with Hepatitis** – Clients ever diagnosed with Hepatitis
 - **Clients with no Pneumovax in X months** – Clients who have not had a Pneumovax immunization in a specified number of months
- **Clinical Encounter Preprints** – Run clinical encounter preprints for selected clients
- **Multiple Client Case Note Report** – Run case note report on multiple clients
- **Service Detail Report** – List details of services provided to clients within a specified range of dates
- **Referrals Report** – List details of referrals provided to clients

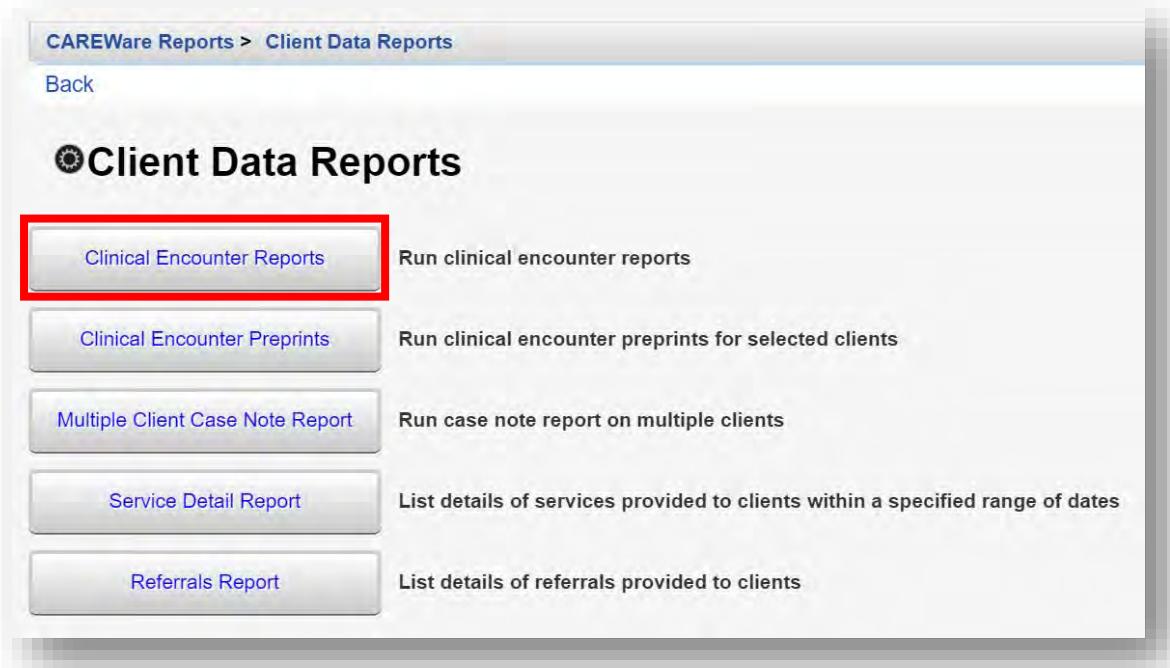
Running the No Services in X Days Report

This report can assist in identifying clients who are overdue receiving services or may be Out of Care. Generally, clients who have not received services in six months or greater are considered to be “out of care.” (Note: that this report only includes clients with Enrollment Status of Active or Unknown.)

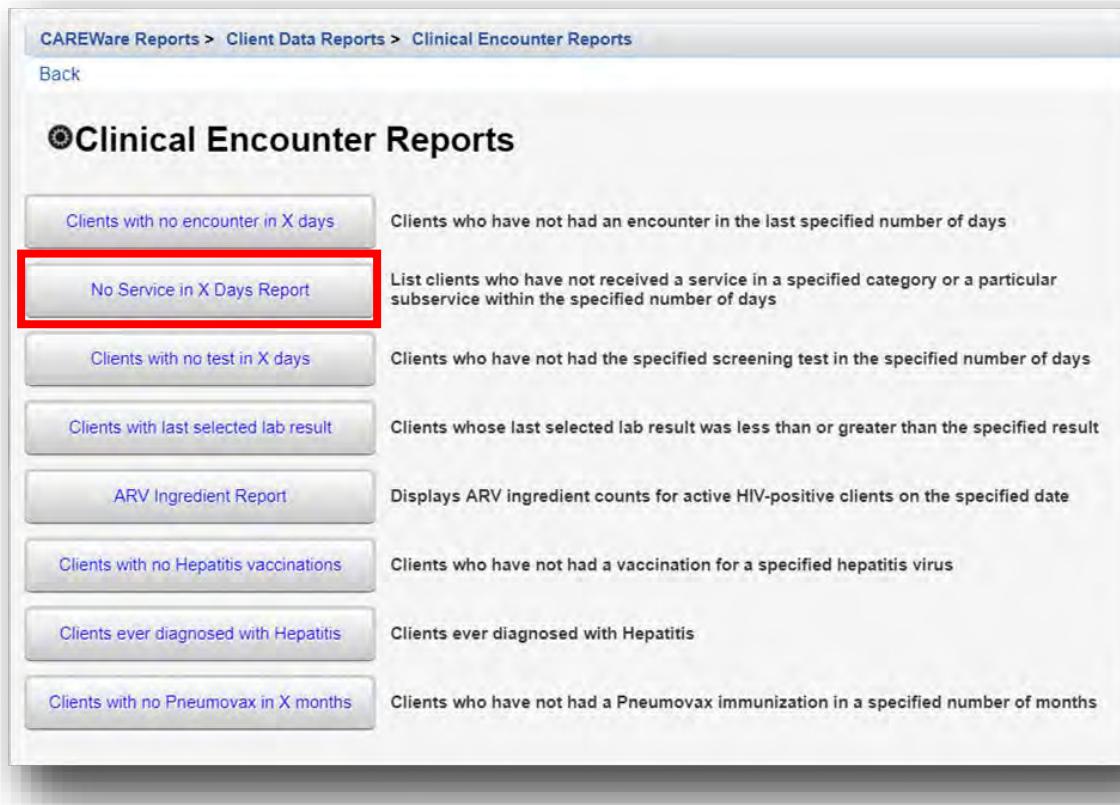
1. From the CAREWare Reports menu, click **Client Data Reports**.



2. On the next menu, select **Clinical Encounter Reports**.



3. Select the No Service in X Days Report.



CAREWare Reports > Client Data Reports > Clinical Encounter Reports

Back

Clinical Encounter Reports

Clients with no encounter in X days

No Service in X Days Report

Clients who have not had an encounter in the last specified number of days

Clients with no test in X days

Clients who have not had the specified screening test in the specified number of days

Clients with last selected lab result

Clients whose last selected lab result was less than or greater than the specified result

ARV Ingredient Report

Displays ARV ingredient counts for active HIV-positive clients on the specified date

Clients with no Hepatitis vaccinations

Clients who have not had a vaccination for a specified hepatitis virus

Clients ever diagnosed with Hepatitis

Clients ever diagnosed with Hepatitis

Clients with no Pneumovax in X months

Clients who have not had a Pneumovax immunization in a specified number of months

4. Select the Service Category, Subservice Type, and Number of Days. Check Apply Custom Filter, Hide Personally Identifying Information, and/or Include shared services entered by other providers, as applicable.

CAREWare Reports > Client Data Reports > Clinical Encounter Reports > Clients with no service in X days

Edit Filter **Run** **PDF** Cancel

Clients with no service in X days

Service Category: Outpatient/Ambulatory Health Services

Subservice Type: Medical Care/Outpatient/Ambulatory Medical Care

Number of Days: 180

Apply Custom Filter:

Hide Personally Identifying Information:

Include shared services entered by other providers:

5. Click Run to open the report in a new tab. Click PDF to open the report as a PDF.

- Once you click **Run**, a report confirmation message will open in the upper right corner of the screen. Select **View Clients with no service in X days**. Your report will be displayed in a new tab.



NOTE: Blank service date records indicate that a client record was created, but no service was entered. This could be either a data entry issue, where service information needs to be entered, or an indication that clients made an appointment but did not return for service.

This report can be used as a tool to perform chart review and monitoring, or to determine the cause of client record(s) without services.

Running Financial Reports

The Financial Report can be run to determine how much you've expended in a specific time frame for any or all service categories and subservices, if you have specified a service cost when you set up your contracts and services.

Even if you aren't tracking cost information, the Financial Report is an easy way to get a quick summary of unduplicated clients served within a specific date span, as well as a distribution of the number of clients for each HRSA Service Category.

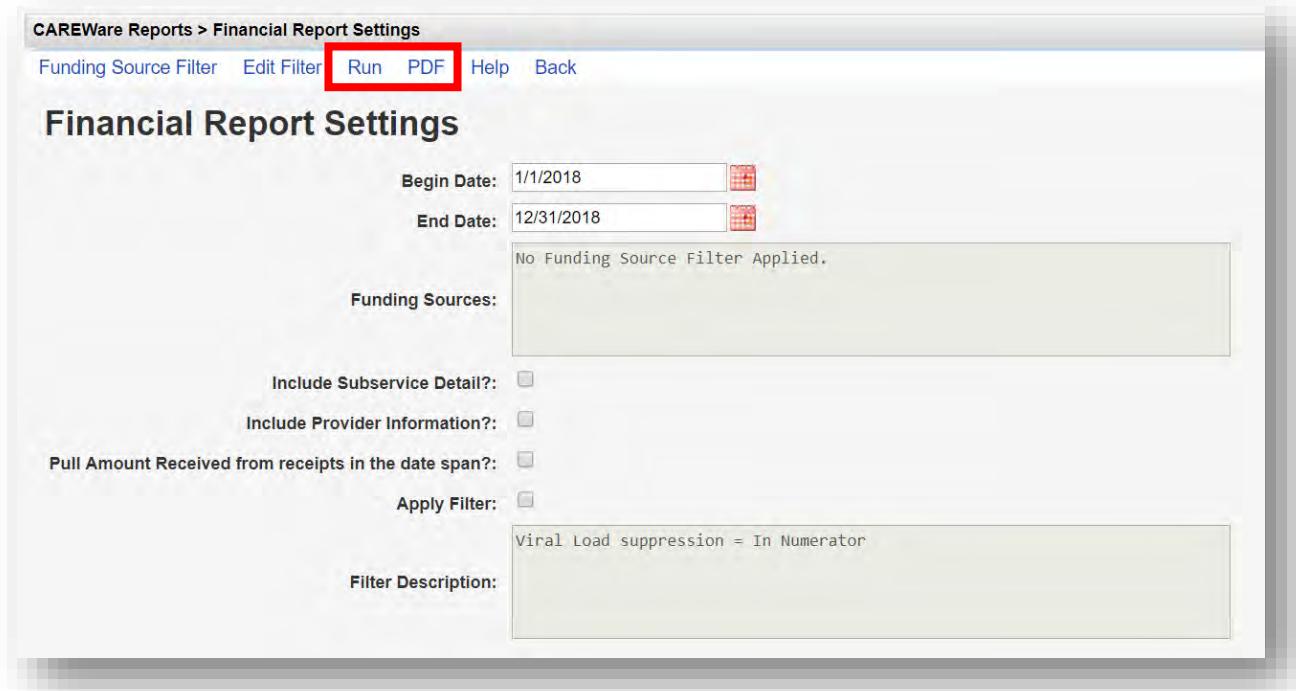
The Financial Summary report can also display client totals and services for a single or multiple Funding Source(s).

1. From the **Reports** menu, select the **Financial Report**.



2. Make your selections as detailed below:

- Begin Date
- End Date
- **Funding Sources** can be edited under the Funding Source Filter link
- Check **Include Subservice Detail** if you wish to see service category information broken down to the subservice level.
- **Include Provider Information** is only relevant when you run a report on one provider; it includes provider address and phone number
- Check **Pull Amount Received from receipts in the date span** if you wish to see the amount received from receipts between the begin and end date
- You can **Apply Filter(s)** to use a custom report filter on your data to get more granular results. Click the **Edit Filter** link to *Manage, Add, Delete*, etc. filters.



CAREWare Reports > Financial Report Settings

Funding Source Filter Edit Filter Run PDF Help Back

Financial Report Settings

Begin Date: 1/1/2018

End Date: 12/31/2018

No Funding Source Filter Applied.

Funding Sources:

Include Subservice Detail?:

Include Provider Information?:

Pull Amount Received from receipts in the date span?:

Apply Filter:

Viral Load suppression = In Numerator

Filter Description:

3. Click **Run** to open the report in a new tab. Click **PDF** to open the report as a PDF.

4. Once you click **Run**, a report confirmation message will open in the upper right corner of the screen. Select **View Financial Report**. Your report will be display in a new tab.



CAREWare 6



Section 7:

Creating Basic Custom Reports

Adapted from HRSA Quick Start User Guides:
<https://hab.hrsa.gov/program-grants-management/careware>

PLEASE NOTE: The client data used in these manuals is purely fictional.

First Things First

Getting Started

- You must have the appropriate user privileges to create and run reports.
- You should have enough client data entered to see how report filtering works in practice.

Best practices

Check if there are pre-built reports that provide the desired information. Decide what the purpose of a custom report is. "I need a list of my clients with a break-out by race and gender," for instance.

Diagram your report by selecting the fields you'll need - in this case, client name, race, and gender.

You may need to add fields, at least temporarily, that confirm your reports are running as intended. For example, you create a filter for active clients only, so to make sure it's working, you might add the "Enrollment status" field to your report. If the report runs correctly, and only Active results return in that column, you can delete that field from the report, if not needed in the results.

Demographic reports run differently than other reports:

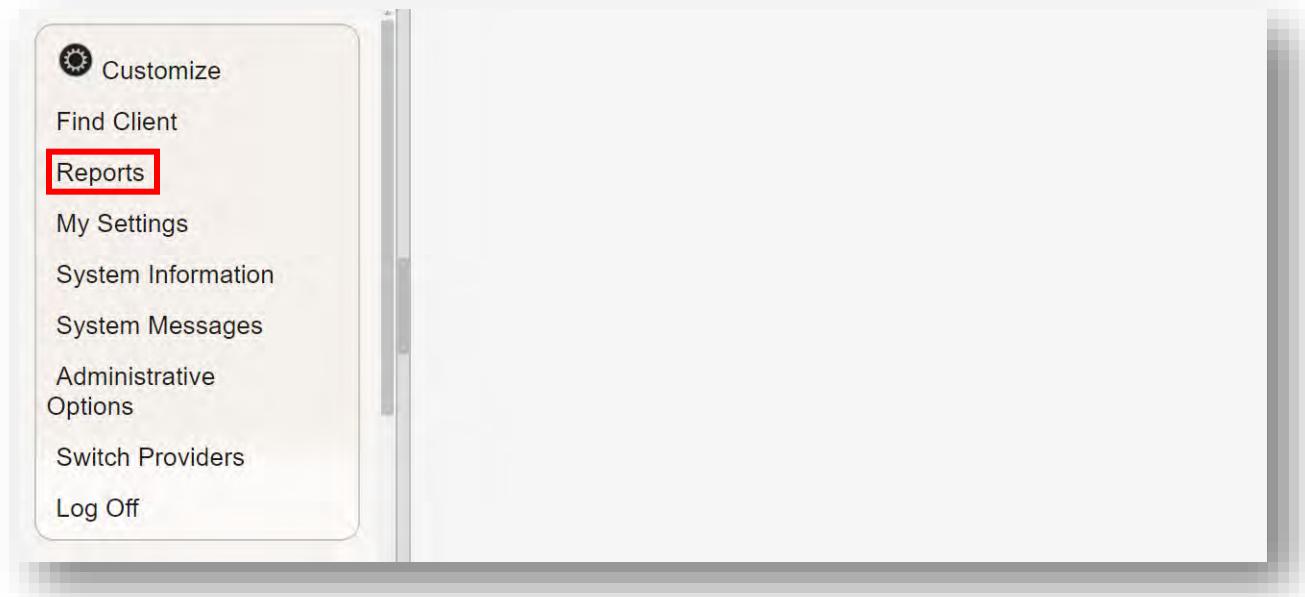
- Demographic reports display results per client. This can be useful in determining the number of clients in a given date span. With the use of calculated objects, demographic reports can be a powerful tool for data analysis (see Quick Start guide 8 - Advanced Reports).
- Other report types; such as services and labs display results 'per service visit or lab date.' This often results in several lines for each client, providing a detailed summary.

Creating Custom Reports

In addition to the prebuilt reports in CAREWare, you can use custom reports to view data sets tailored to your needs. It helps if you have some familiarity with SQL databases before you use custom reports, but if not, the report builder feature will help you design queries without prior database experience.

1. Log into CAREWare. For more details on how to do so, please refer to the **Navigating CAREWare Version 6.0 Guide**. If you have administrative privileges and are asked to choose between Central Administration and Provider ("Default" until you change the name) domain, you can log into either a Provider or the Central Administration domain. To run reports for multiple agencies within a provider network, log in to the Central Administration domain.

2. Select Reports from the Main Menu.



3. Select Custom Reports from the link menu.



4. Select **Manage/Run Custom Reports** from the link menu.

CAREWare Reports > Custom Reports

Back

Custom Reports

Manage/Run Custom Reports Run or manage custom reports

Export Custom Reports Export custom report definitions to a portable xml file

Import Custom Reports from an xml file Import custom report definitions from a portable xml file

5. Select **Add**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports

Manage Run **Add** Delete Make Read Only Back Help Print or Export

Manage/Run Custom Reports

Search:

Name	CrossTab	Report Type	Report Type	Description
Death dates		01	Demographics	dates of death
First Medical Service		01	Demographics	1st srvc
Sum of Services		01	Demographics	add em up
Cap on charges II		01	Demographics	
Body Weights		01	Demographics	weigh them.

6. Enter in the following information (as applicable) and click **Save**.

- Report Name
- Report Type
- Is Crosstab (checkbox)
- Description (optional)
- Use Totals (checkbox – will automatically sum total fields in the report)
- Header/Footer Format (optional)

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Add

[Save](#) [Back](#)

Add

Setup Details

Report Name: Clients by Race and Gender

Report Type: Demographics 

Is Crosstab:

Description:

Use Totals:

Header/Footer Format

Font Name: Arial 

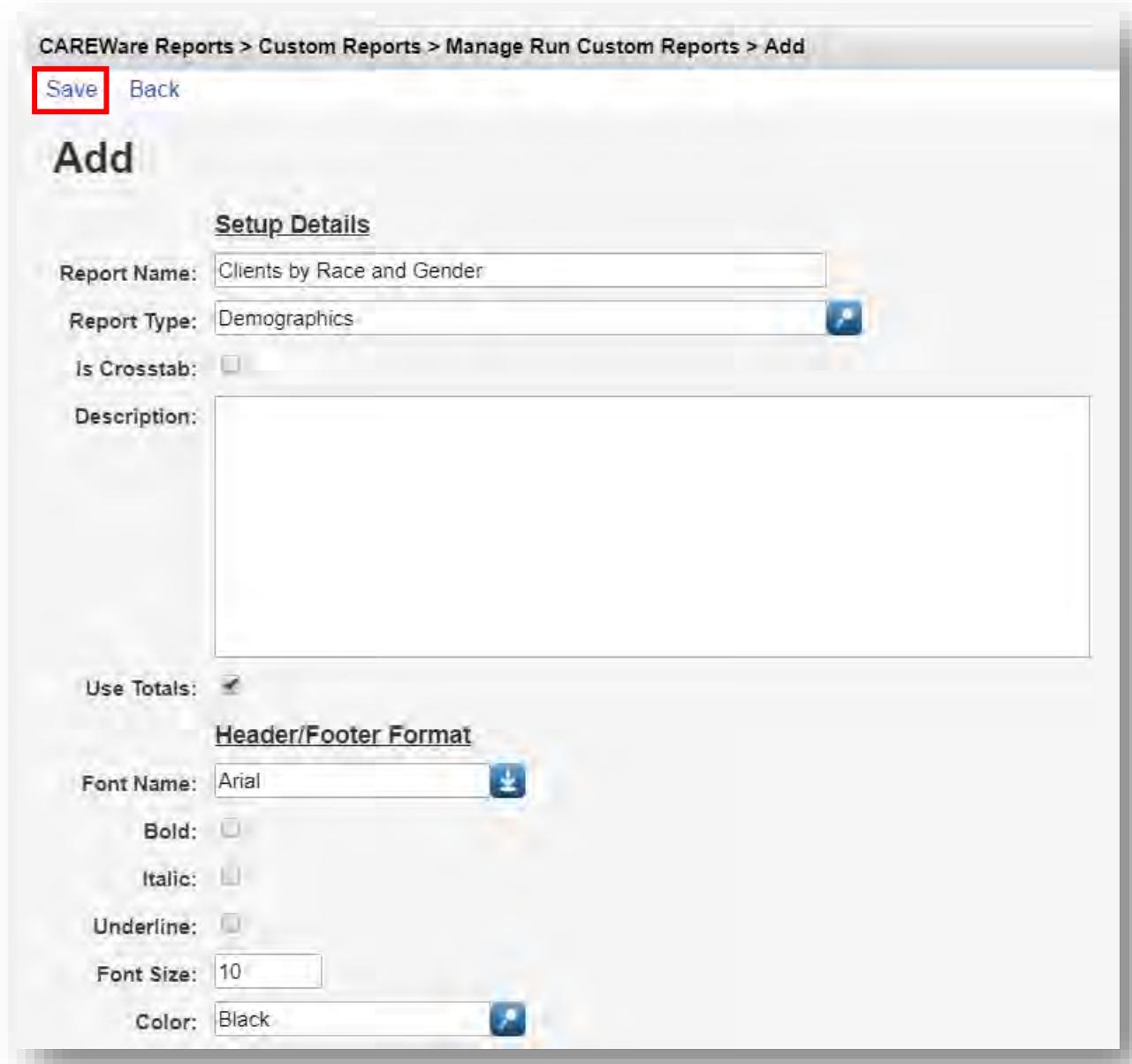
Bold:

Italic:

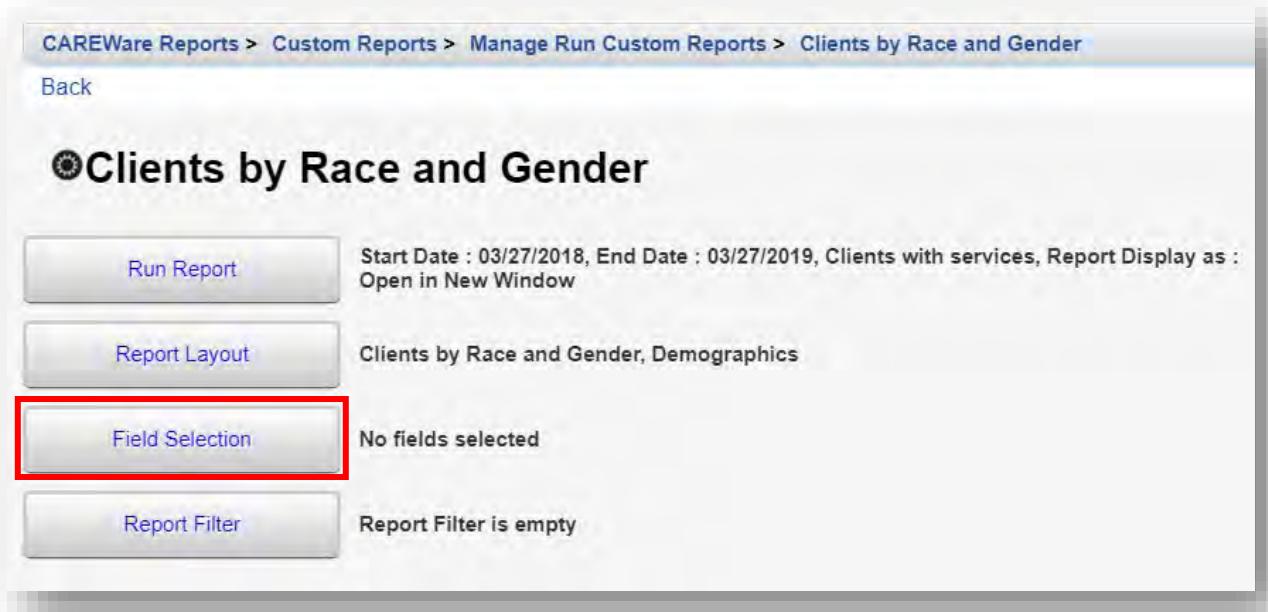
Underline:

Font Size: 10 

Color: Black 



7. After clicking save, you will be on the custom report's menu. Select **Field Selection**.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender

Back

Clients by Race and Gender

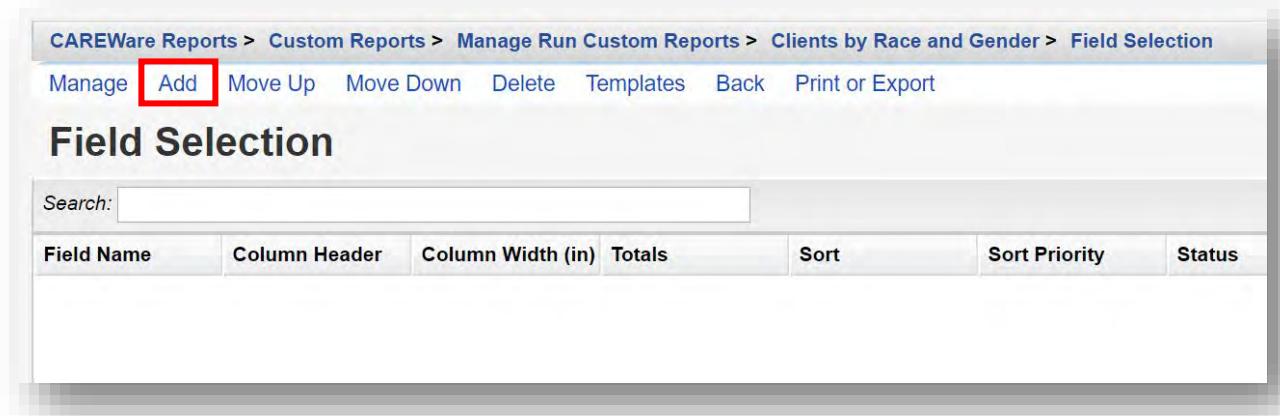
Run Report Start Date : 03/27/2018, End Date : 03/27/2019, Clients with services, Report Display as : Open in New Window

Report Layout Clients by Race and Gender, Demographics

Field Selection No fields selected

Report Filter Report Filter is empty

8. Select **Add**.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection

Manage **Add** Move Up Move Down Delete Templates Back Print or Export

Field Selection

Search:

Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status

9. Use the **Search** box to find the fields to display in the report. In this example, “Name” was entered. Since the complete client name is desired for the report, the Name field has been selected. Click **Use Field**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection > Add

Use Field Back Print or Export

Report Fields

Search: Name

Field Name	Keywords	Previous Field Name	Description
Medications by indication	Demographics	Client Meds By Ind.	Returns full medication name for selected indication
Current Regimen	Demographics	Current Regimen	Returns a list of ARV medications in a current regimen
First Name	Demographics	First Name	
Last Name	Demographics	Last Name	
Last Service In Contract	Demographics	Last Service In Contract	Returns name of service category
Middle Name	Demographics	Middle Name	
Name	Demographics	Name	
Physician name	Demographics	Phys. Name	
Preferred Name (Cln. Custom)		Preferred Name (Cln. Custom)	Culturally Sensitive Name requested by the client

10. You will now be on the Use Field menu. Enter in the following information (as applicable) and click **Save**.

- **Column Header**
- **Sort**
- **Sort Priority**
- **Header Column Format**
- **Data Column Format**

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection > Add > Use Field

Save Back

Use Field

Select Field: Name

Column Header: Name

Sort: Ascending 

Sort Priority: 1

Header Column Format

Column Width: 1.44 inches

Column Header Font Name: Arial 

 Bold:

 Italic:

 Underline:

 Font Size: 8

 Font Color: Black 

Data Column Format

Font Name: Arial 

 Bold:

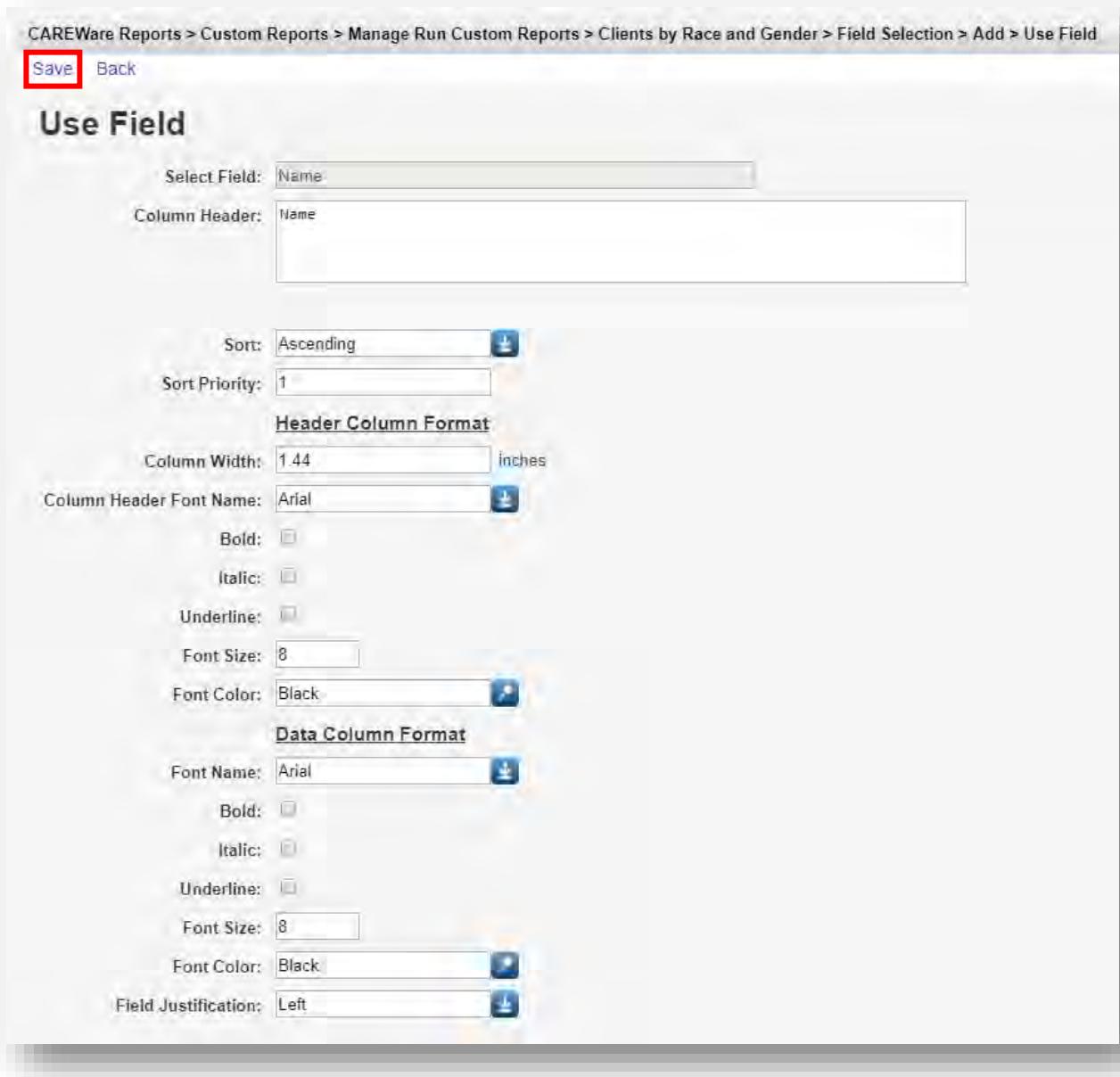
 Italic:

 Underline:

 Font Size: 8

 Font Color: Black 

Field Justification: Left 

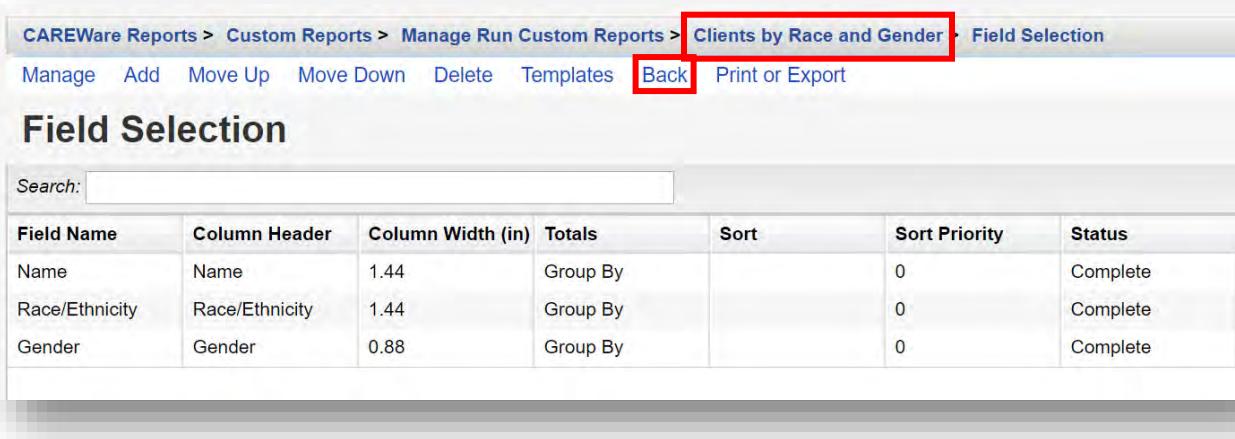


11. After clicking save, you will be on the selected field's menu. Return to the Field Selection menu by clicking **Field Selection** within the breadcrumb trail. Repeat steps 8 through 10 to add additional Report Field selections (such as *Race/Ethnicity* and *Gender*).



The screenshot shows the CAREWare Reports interface. The breadcrumb trail is: CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > **Field Selection** > Name. The 'Field Selection' link is highlighted with a red box. Below the breadcrumb, there is a 'Back' link. The main content area is titled 'Name' with a radio button icon. It contains a 'View Select Field' button and a 'Name; Demographics' label.

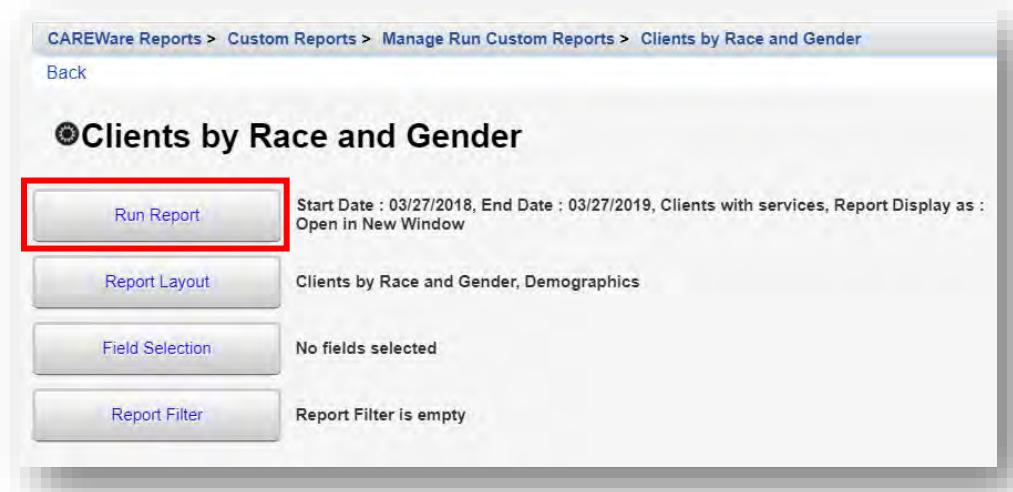
12. To Return to the custom report's menu, click the name of the custom report in the breadcrumb trail (in this example, "Clients by Race and Gender") or click **Back** from the Field Selection menu.



The screenshot shows the CAREWare Reports interface. The breadcrumb trail is: CAREWare Reports > Custom Reports > Manage Run Custom Reports > **Clients by Race and Gender** > Field Selection. The 'Clients by Race and Gender' link is highlighted with a red box. Below the breadcrumb, there are links for Manage, Add, Move Up, Move Down, Delete, Templates, Back, and Print or Export. The 'Back' link is highlighted with a red box. The main content area is titled 'Field Selection' and contains a search bar and a table with columns: Field Name, Column Header, Column Width (in), Totals, Sort, Sort Priority, and Status. The table data is as follows:

Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status
Name	Name	1.44	Group By		0	Complete
Race/Ethnicity	Race/Ethnicity	1.44	Group By		0	Complete
Gender	Gender	0.88	Group By		0	Complete

13. Click **Run Report**



The screenshot shows the CAREWare Reports interface. The breadcrumb trail is: CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender. The 'Clients by Race and Gender' link is highlighted with a red box. Below the breadcrumb, there is a 'Back' link. The main content area is titled 'Clients by Race and Gender'. It contains several buttons: 'Run Report' (highlighted with a red box), 'Report Layout' (disabled), 'Field Selection' (disabled), and 'Report Filter' (disabled). To the right of the buttons, there is a note: 'Start Date : 03/27/2018, End Date : 03/27/2019, Clients with services, Report Display as : Open in New Window'. The 'Run Report' button is highlighted with a red box.

14. Click **Edit**. Select the following report parameters and click **Save** (will be visible after clicking **Edit**).

- **Date From**
- **Date Through**
- **Clinical Review Year** (optional – typically matches the reporting year)
- **Output Display**
 - Download as CSV
 - Open in New Window
 - Open as PDF
- **Show New Client only** (check box)
- **Show Clients with Service only** (check box – will only list clients with services within date span)
- **Show Specifications** (check box – to list report criteria)
- **Sum Numeric Fields** (check box)
- **Domain Sharing Settings** (default value)

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Run Report

Edit Run Report Back

Run Report

Parameters

Date From: 3/27/2018

Date Through: 3/27/2019

Clinical Review Year: 2019

Output Display: Open in New Window

Show New Clients only:

Show Clients with Service only:

Show Specifications:

Sum Numeric Fields:

Domain Sharing Settings

Show Shared Service Records:

Show Shared Clinical Records:

Show Shared Custom Subform Records:

Show Shared Case Notes:

15. Click **Run Report** and then click **View [name of report]** (in this example, View Clients by Race and Gender). The report will appear in a new tab within your browser.

The screenshot shows the CAREWare Reports interface. At the top, the navigation path is: CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Run Report. Below this, there are three buttons: Edit, Run Report (which is highlighted with a red box), and Back. The main area is titled 'Run Report' and contains a 'Parameters' section with the following fields: Date From (1/1/2019), Date Through (12/31/2019), Clinical Review Year (2019), and Output Display (Open in New Window). There are also several checkboxes for filtering clients: Show New Clients only, Show Clients with Service only, Show Specifications, and Sum Numeric Fields. Below these is a 'Domain Sharing Settings' section with checkboxes for Show Shared Service Records, Show Shared Clinical Records, Show Shared Custom Subform Records, and Show Shared Case Notes. To the right of the 'Run Report' section is a dark overlay box with a green checkmark icon and the text 'Report generation complete.' and a red box around the link 'View Clients by Race and Gender'. Below this, the generated report titled 'Clients by Race and Gender' is displayed. It shows the following data:

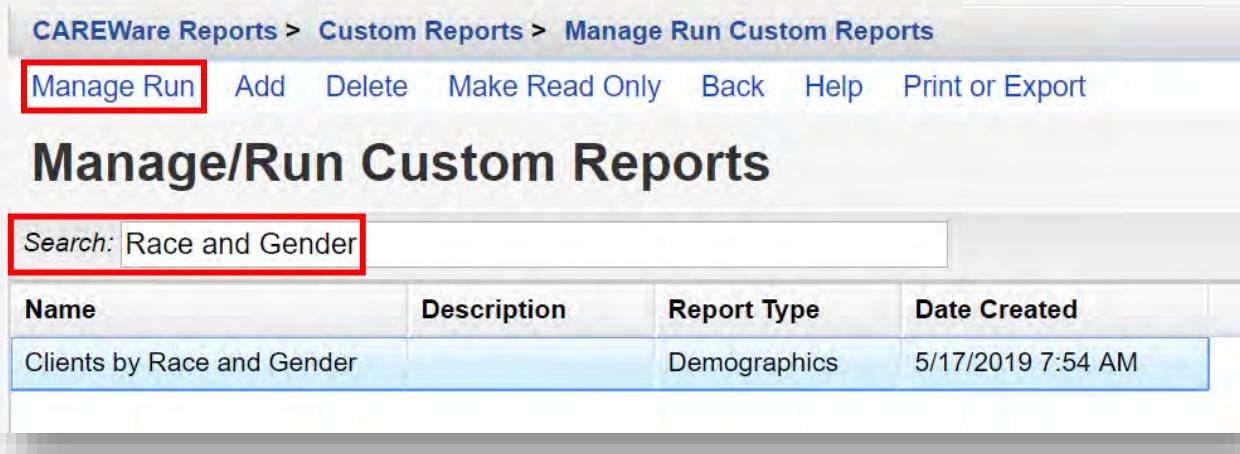
Name:	Race/Ethnicity:	Gender:
Adap, Sigourney	Hispanic	Female
Appleseed, Johnny	Hispanic	Male
Appleseed, Martha	Not Specified	Transgender MtF
Badge, Jane	Hispanic	Female
Badland, Abbey	Hispanic	Female
Baker, Clam	Pacific Islander	Male
Brown, Buster	Hispanic	Transgender MtF

Add Report Filters to “Clients by Race and Gender”

Use the **Report Filter** to choose how to sort your data. (It is a good idea to include Field Selections that will verify your filters are working as intended.) For example: if you filter your report for Females only, you would want to include the ‘Gender’ column among your Field Selections in the report.

You can add a filter at the same time you create your field selections, before saving your report. However, you may first want to run a report without filters to make sure you’re getting data, and then add the filters.

1. From the Manage/Run Custom Reports menu (see pages 2 through 3), use the **Search** box to find the relevant report. We will be using the custom report: “Clients by Race and Gender.” Select the report and click **Manage Run**.



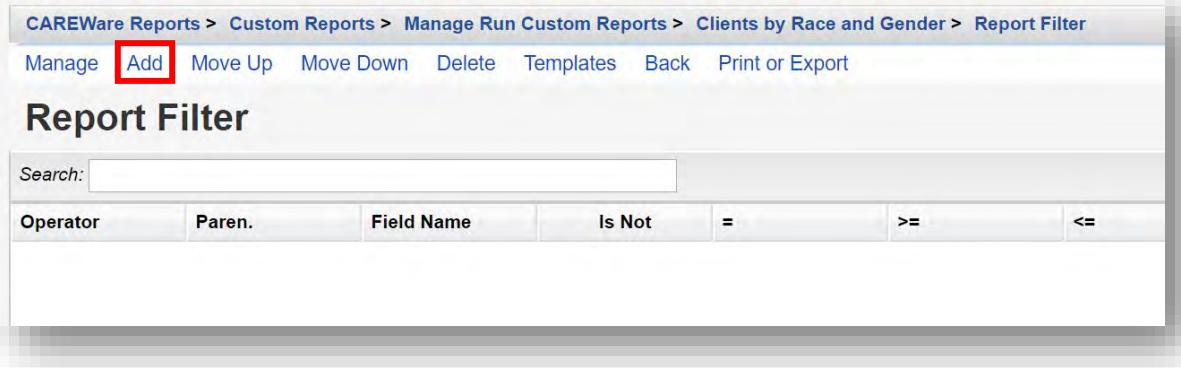
The screenshot shows a software interface for managing custom reports. The top navigation bar includes links for CAREWare Reports, Custom Reports, Manage Run Custom Reports, Manage Run (which is highlighted with a red box), Add, Delete, Make Read Only, Back, Help, and Print or Export. Below the navigation is a search bar with the text 'Search: Race and Gender'. A table lists a single report entry: 'Clients by Race and Gender' under 'Name', 'Demographics' under 'Report Type', and '5/17/2019 7:54 AM' under 'Date Created'.

2. Click **Report Filter**.



The screenshot shows the configuration page for the 'Clients by Race and Gender' report. The top navigation bar includes links for CAREWare Reports, Custom Reports, Manage Run Custom Reports, Clients by Race and Gender (which is highlighted with a red box), and Back. The main title is 'Clients by Race and Gender'. Below the title are several configuration buttons: 'Run Report' (disabled), 'Report Layout' (disabled), 'Field Selection' (disabled), and 'Report Filter' (disabled). The 'Report Filter' button is highlighted with a red box. To the right of the buttons, there is descriptive text: 'Start Date : 03/27/2018, End Date : 03/27/2019, Clients with services, Report Display as : Open in New Window' for the Run Report button, 'Clients by Race and Gender, Demographics' for the Report Layout button, 'No fields selected' for the Field Selection button, and 'Report Filter is empty' for the Report Filter button.

3. Click **Add**.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter

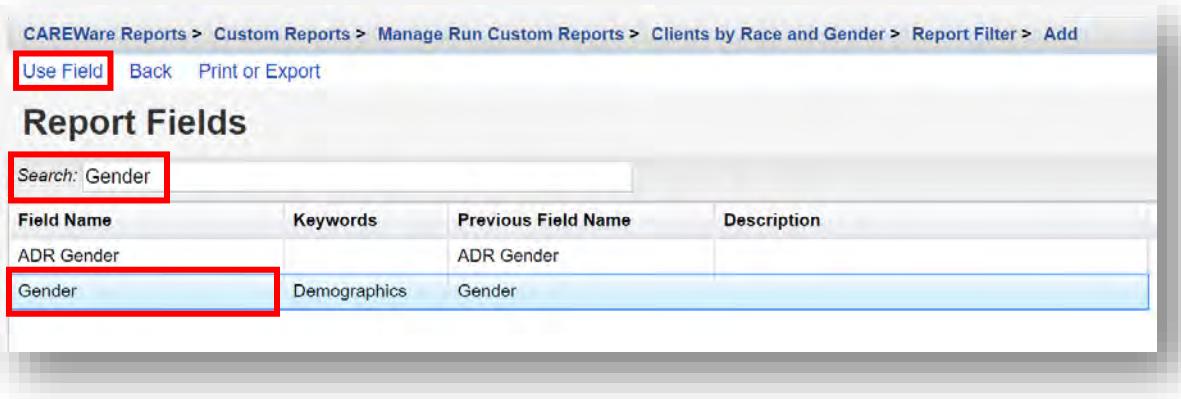
Manage **Add** Move Up Move Down Delete Templates Back Print or Export

Report Filter

Search:

Operator	Paren.	Field Name	Is Not	=	>=	<=

4. Enter “Gender” in the **Search** box to limit available Field Names. Choose the appropriate Field Name and select **Use Field**.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter > Add

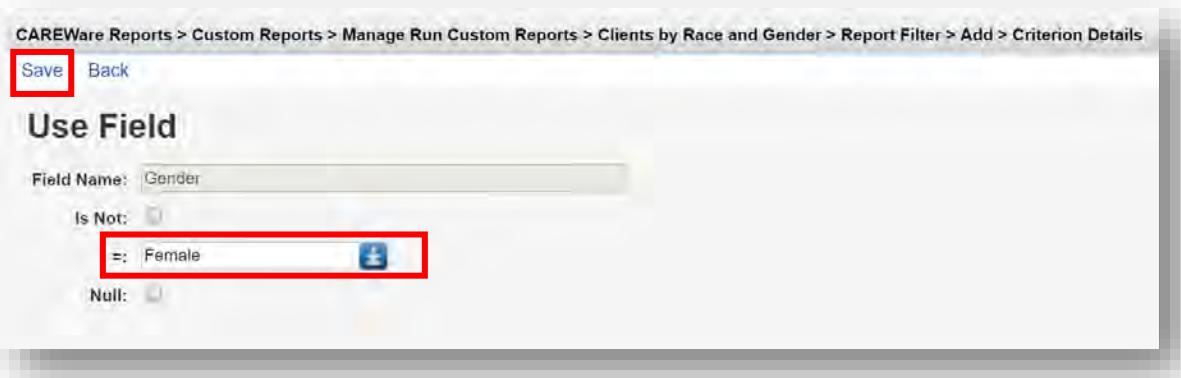
Use Field Back Print or Export

Report Fields

Search: Gender

Field Name	Keywords	Previous Field Name	Description
ADR Gender		ADR Gender	
Gender	Demographics	Gender	

5. Select Female from drop-down box. Click **Save**.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter > Add > Criterion Details

Save Back

Use Field

Field Name: Gender

Is Not:

=: **Female**

Null:

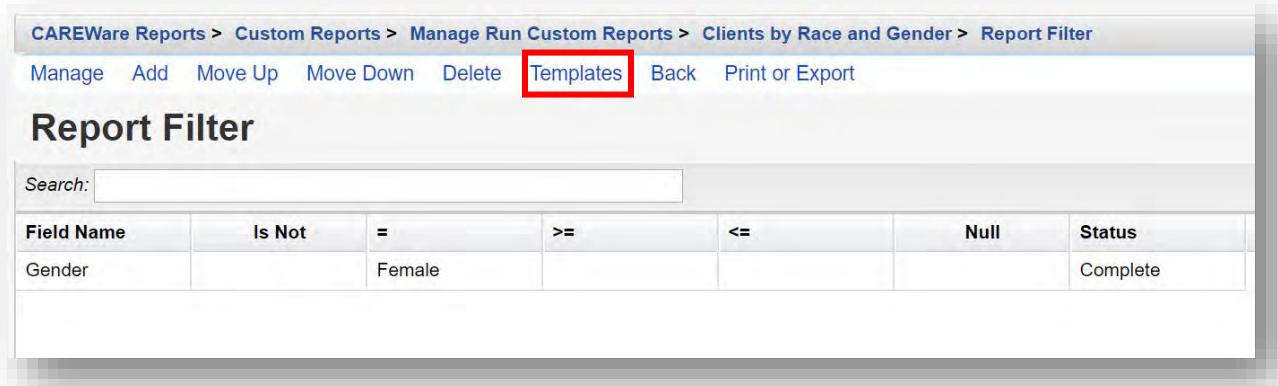


NOTE: The default value for Use Field is equal to “=”. Checking the **Is Not** box will return all values unlike the one selected. For example, if you selected Gender IS NOT Female, the report would return Male, Transgender, Refused to Report, and Unknown values. Checking the **Null** box would return any values where the Gender field was missing.

Saving Filters as Templates

After selecting your filter field(s), you may also save this field selection as a template. Saving as a template lets you apply the filter you've created to any report type.

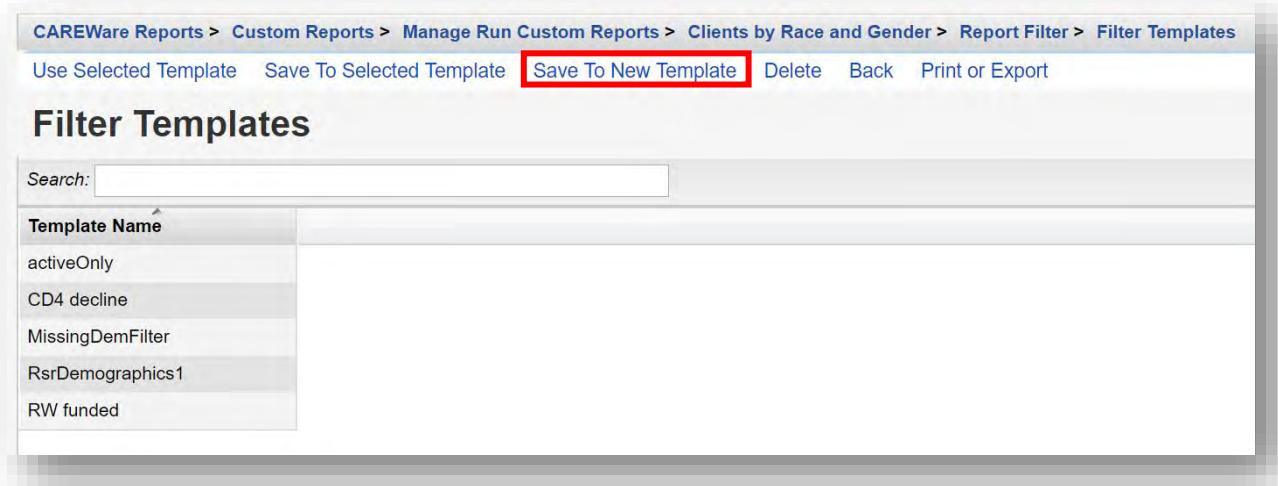
1. From the Report Filter menu, select **Templates**.



The screenshot shows the 'Report Filter' screen with a single filter condition: Gender = Female. The 'Templates' button in the top menu is highlighted with a red box.

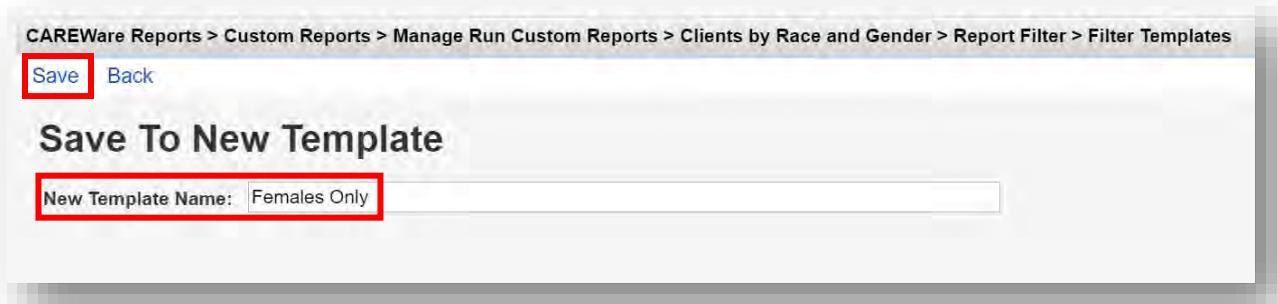
Field Name	Is Not	=	>=	<=	Null	Status
Gender		Female				Complete

2. Select **Save to New Template**.



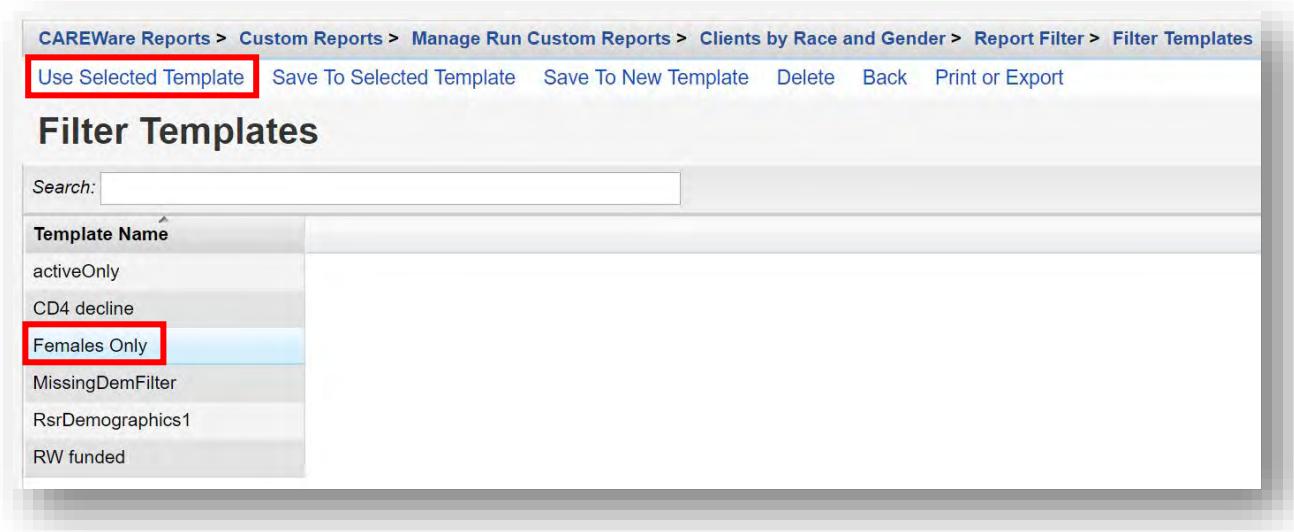
The screenshot shows the 'Filter Templates' screen with a list of existing templates: activeOnly, CD4 decline, MissingDemFilter, RsrDemographics1, and RW funded. The 'Save To New Template' button in the top menu is highlighted with a red box.

3. Enter the **New Template Name** and then click **Save**.



The screenshot shows the 'Save To New Template' dialog box with the 'New Template Name' field containing 'Females Only'. The 'Save' button in the top left is highlighted with a red box.

4. The filter template will appear on the Template Name list. In the future you can go to the Templates window and select a template to use as a filter or set of filters. Just select the filter and click **Use Selected Template**.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter > Filter Templates

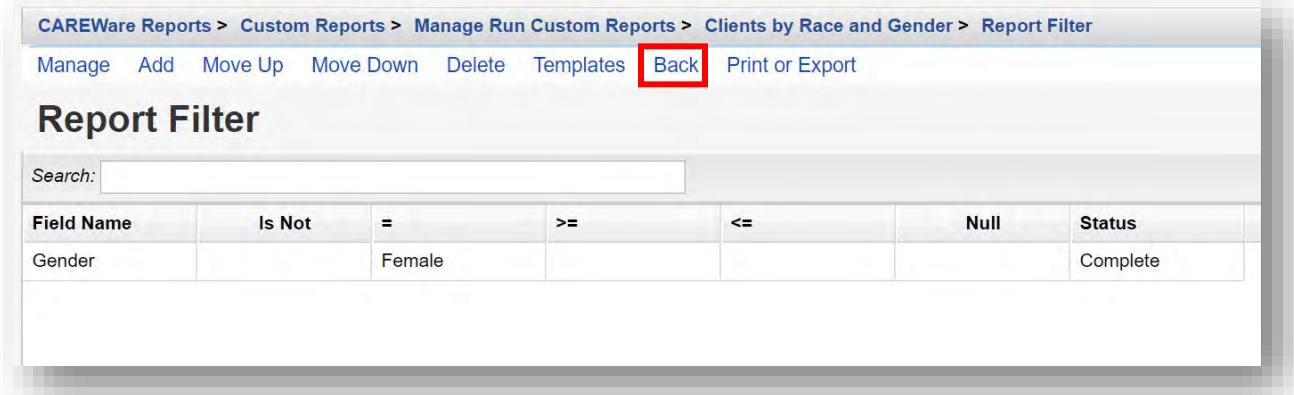
Use Selected Template Save To Selected Template Save To New Template Delete Back Print or Export

Filter Templates

Search:

Template Name
activeOnly
CD4 decline
Females Only
MissingDemFilter
RsrDemographics1
RW funded

5. Select Back



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter

Manage Add Move Up Move Down Delete Templates **Back** Print or Export

Report Filter

Search:

Field Name	Is Not	=	>=	<=	Null	Status
Gender		Female				Complete

6. Click **Run Report**. Follow steps 14 and 15 on page 9-10.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender

Back

Clients by Race and Gender

Run Report

Start Date : 03/27/2018, End Date : 03/27/2019, Clients with services, Report Display as : Open in New Window

Report Layout

Clients by Race and Gender, Demographics

Field Selection

No fields selected

Report Filter

Report Filter is empty

Crosstab Reports

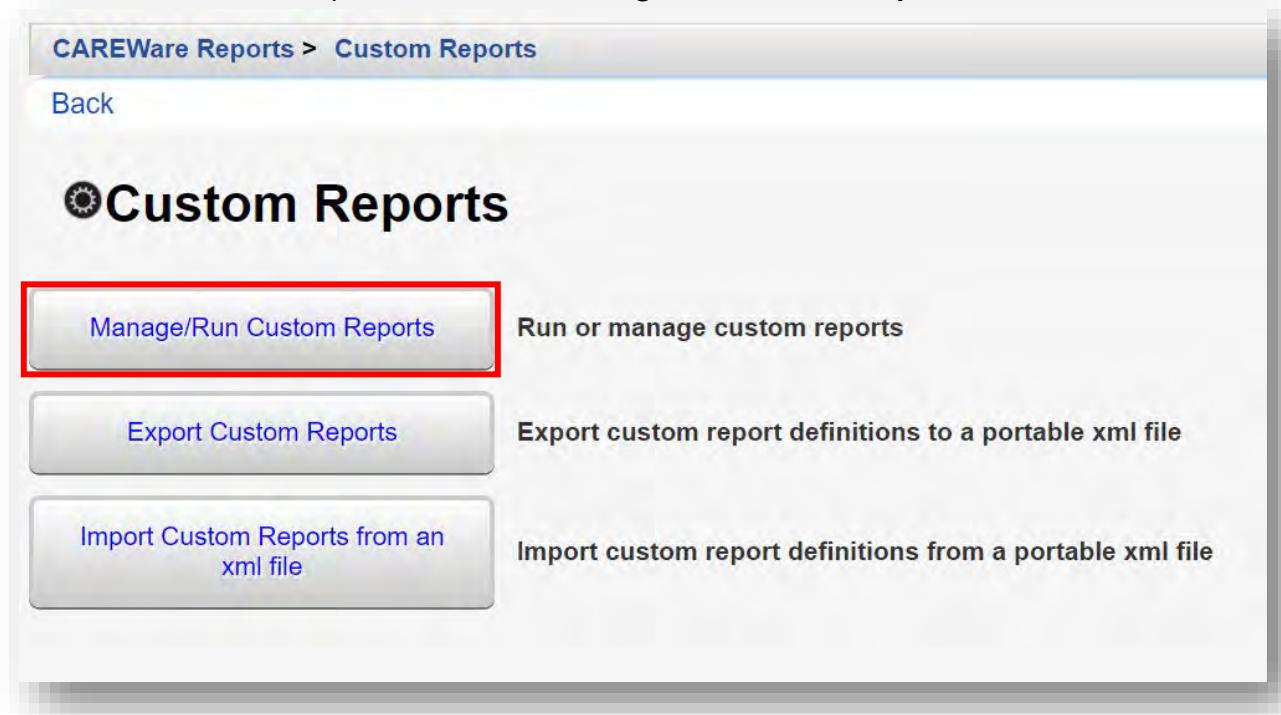
In the example above, we produced a report that listed each client separately. This is especially helpful when you need a list in order to identify specific clients requiring follow up (e.g. needing a vaccine, or who haven't had an office visit for more than 3 months).

In addition, custom reports can be very useful in assessing data quality, for example, by listing all the clients who have missing or out-of-range information for a certain field(s).

Crosstab Reports, however, allow you to quickly obtain the *counts* of clients for specific criteria. For example, you may need to report the number of clients you are serving cross-classified by race/ethnicity and gender, or by HIV status and CD4 group. The crosstab wizard allows you to generate client counts.

Crosstabs have a row, column, and, if specified, a strata field. We will use the custom report created in the previous step and change the report type to a Crosstab.

1. From the Custom Reports menu, click **Manage/Run Custom Reports**.



CAREWare Reports > Custom Reports

Back

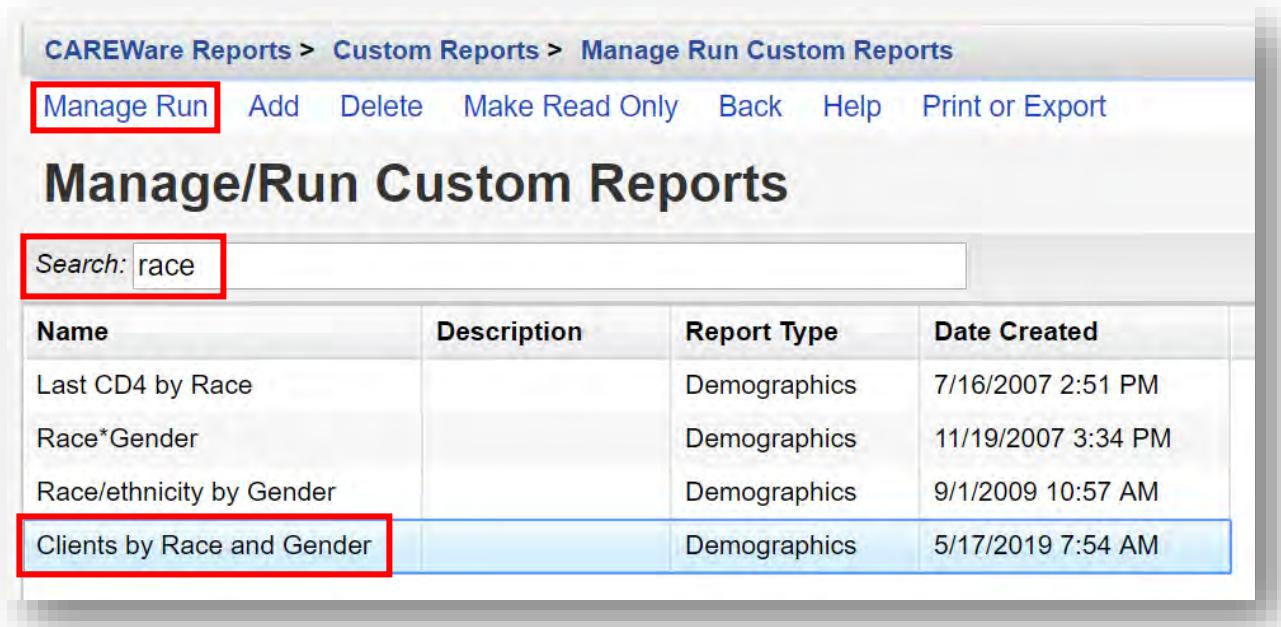
Custom Reports

Manage/Run Custom Reports Run or manage custom reports

Export Custom Reports Export custom report definitions to a portable xml file

Import Custom Reports from an xml file Import custom report definitions from a portable xml file

2. Use the *Search* box to filter the existing custom reports. Select the report **Name** and click **Manage / Run**.



CAREWare Reports > Custom Reports > Manage Run Custom Reports

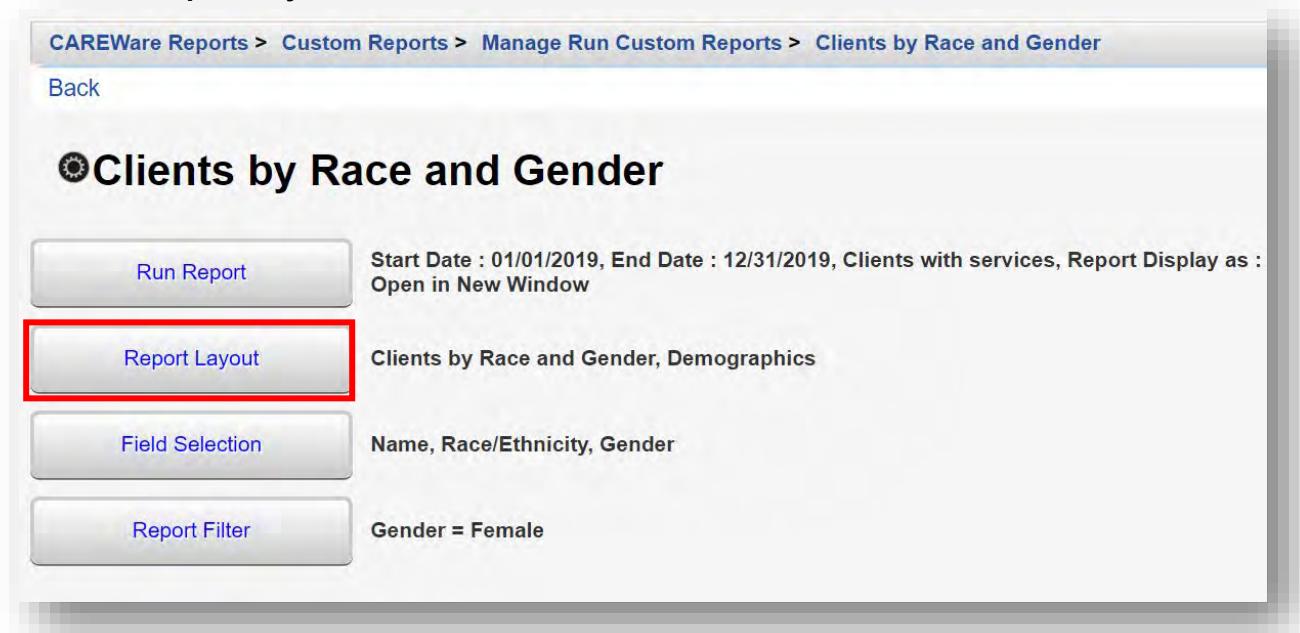
Manage Run Add Delete Make Read Only Back Help Print or Export

Manage/Run Custom Reports

Search: race

Name	Description	Report Type	Date Created
Last CD4 by Race		Demographics	7/16/2007 2:51 PM
Race*Gender		Demographics	11/19/2007 3:34 PM
Race/ethnicity by Gender		Demographics	9/1/2009 10:57 AM
Clients by Race and Gender		Demographics	5/17/2019 7:54 AM

3. Select Report Layout.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender

Back

Clients by Race and Gender

Run Report Start Date : 01/01/2019, End Date : 12/31/2019, Clients with services, Report Display as : Open in New Window

Report Layout Clients by Race and Gender, Demographics

Field Selection Name, Race/Ethnicity, Gender

Report Filter Gender = Female

4. Select **Edit** (located where Save is in the screenshot below). Select the **Is Crosstab** checkbox. Click **Save**.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Layout > Edit

Save Cancel

Edit

Layout Details

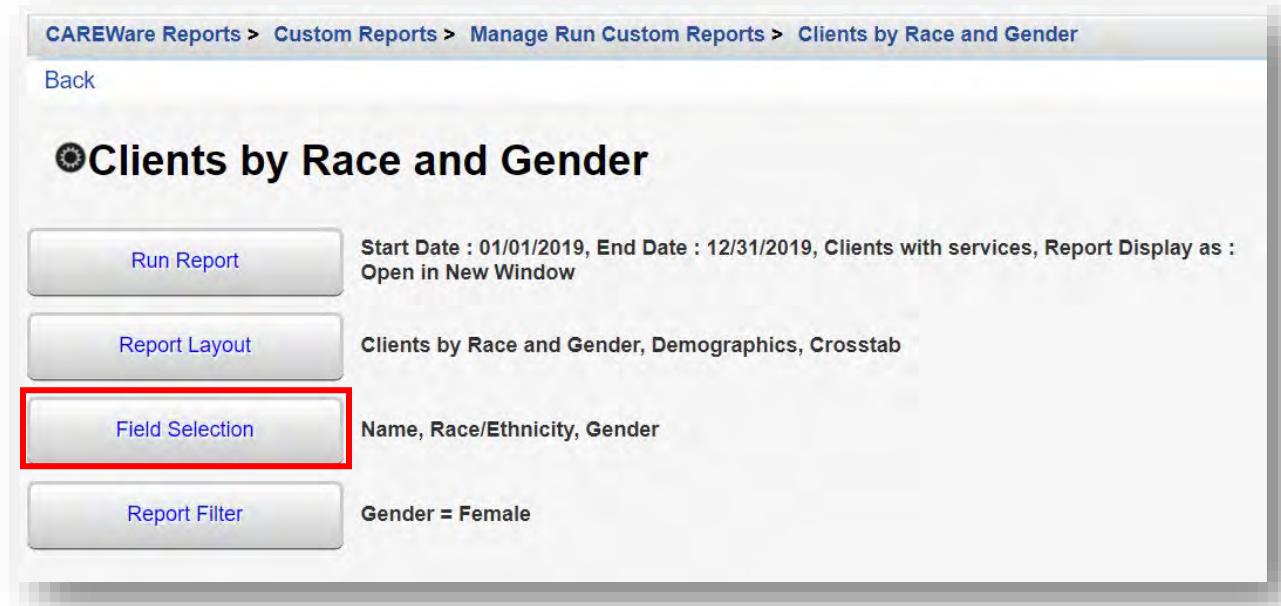
Report Name: Clients by Race and Gender

Report Type: Demographics

Is Crosstab:

Description:

5. After clicking save, click **Field Selection** from the menu.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender

Back

Clients by Race and Gender

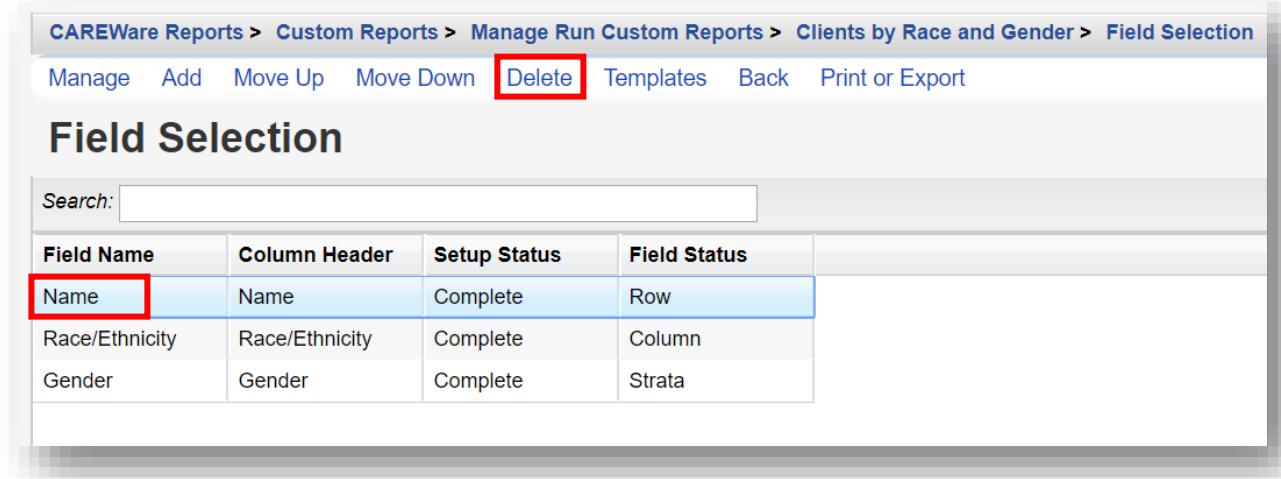
Run Report Start Date : 01/01/2019, End Date : 12/31/2019, Clients with services, Report Display as : Open in New Window

Report Layout Clients by Race and Gender, Demographics, Crosstab

Field Selection Name, Race/Ethnicity, Gender

Report Filter Gender = Female

6. Confirm the Field Names are correct. To remove a Field, select it and click **Delete**. In this example, we are deleting the “Name” field.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection

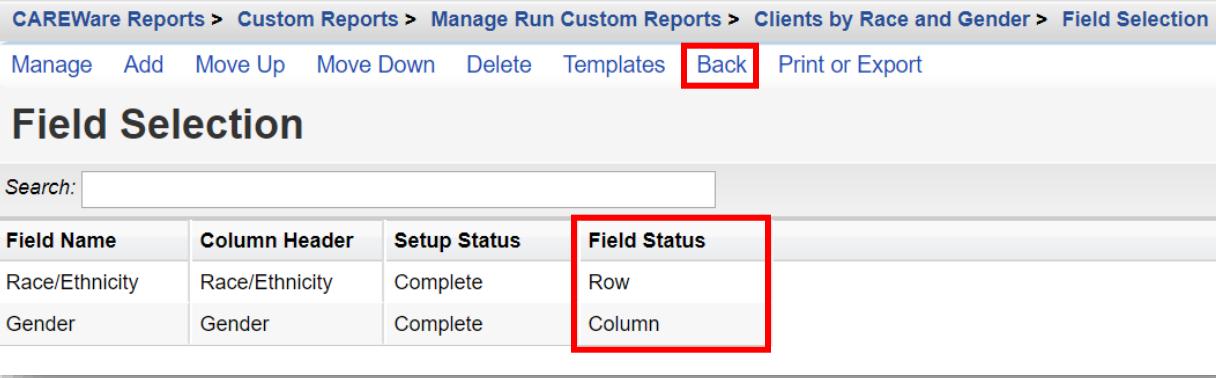
Manage Add Move Up Move Down **Delete** Templates Back Print or Export

Field Selection

Search:

Field Name	Column Header	Setup Status	Field Status
Name	Name	Complete	Row
Race/Ethnicity	Race/Ethnicity	Complete	Column
Gender	Gender	Complete	Strata

7. Race/Ethnicity will be the **Row** and Gender will be the **Column** of the Crosstab Report. Click **Back**.



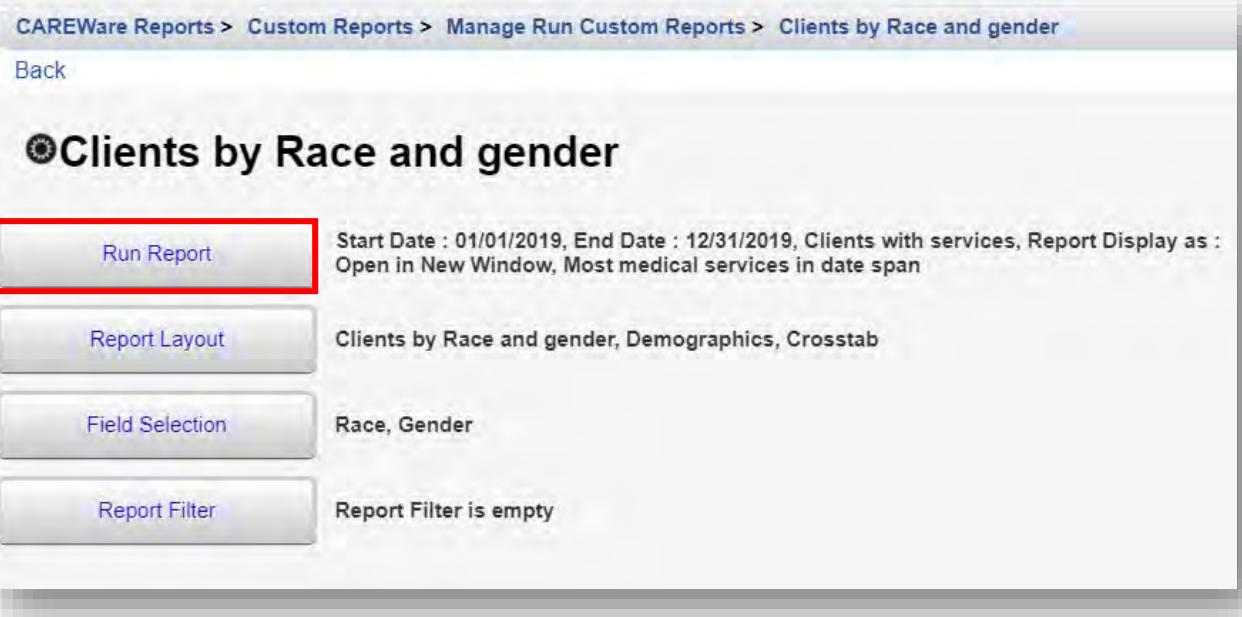
CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection

Manage Add Move Up Move Down Delete Templates **Back** Print or Export

Field Selection

Field Selection			
Field Name	Column Header	Setup Status	Field Status
Race/Ethnicity	Race/Ethnicity	Complete	Row
Gender	Gender	Complete	Column

8. Select Run Report.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and gender

Back

Clients by Race and gender

Run Report Start Date : 01/01/2019, End Date : 12/31/2019, Clients with services, Report Display as : Open in New Window, Most medical services in date span

Report Layout Clients by Race and gender, Demographics, Crosstab

Field Selection Race, Gender

Report Filter Report Filter is empty

9. A sample Crosstab report of Race/Ethnicity by Gender is provided below.

Clients by Race and Gender (Race/Ethnicity by Gender)

Data Scope: Ryan White AIDS Care

Race/Ethnicity by Gender

Race/Ethnicity:	Total:	Col. %:	Female:	Male:	Transgender FtM:	Transgender MtF:
Asian	6	8.0	1 (16.7%)	5 (83.3%)	0	0
Black or African-American	20	26.7	11 (55.0%)	8 (40.0%)	0	1 (5.0%)
Hispanic	24	32.0	6 (25.0%)	14 (58.3%)	1 (4.2%)	3 (12.5%)
More than one race	5	6.7	1 (20.0%)	3 (60.0%)	0	1 (20.0%)
Not Specified	3	4.0	0	3 (100.0%)	0	0
Pacific Islander	1	1.3	0	1 (100.0%)	0	0
White (non-Hispanic)	16	21.3	5 (31.3%)	11 (68.8%)	0	0
Total:	75	100.0	24 (32.0%)	45 (60.0%)	1 (1.3%)	5 (6.7%)

Number of Records: 8

- **Total** column: lists the number of clients by race.
- **Col. %** column: lists the percent distribution of clients by Race.
- **Female, Male, Transgender FtM, and Transgender MtF** columns: show the gender distribution for each race category.

In the example above, Hispanic clients are 25% female and about 60% male clients, whereas about 70% of white clients are male.

Crosstab Report (Adding a Strata field)

To see the race and gender distribution of clients by HIV risk, you can add **HIV Risk Factor** as a third Field Selection or **Strata** field.

1. From the Field Selection menu (see page 19), click **Add**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection

Manage **Add** Move Up Move Down Delete Templates Back Print or Export

Field Selection

Field Selection			
Field Name	Column Header	Setup Status	Field Status
Race/Ethnicity	Race/Ethnicity	Complete	Row
Gender	Gender	Complete	Column

2. Use the **Search** box to find the desired Field Name. Choose the appropriate Field Name (in this example we are adding HIV Risk Factor) and select **Use Field**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection > Add

Use Field Back Print or Export

Report Fields

Search: **hiv risk factor**

Field Name	Keywords	Previous Field Name	Description
Hemophiliac HIV risk factor	Demographics	Hemo	Returns yes or no
Heterosexual HIV risk factor	Demographics	Hetero	Returns yes or no
HIV Risk Factor	Demographics	HIV Risk Factor	
Perinatal HIV transmission risk	Demographics	Peri	Returns yes or no if client has perinatal HIV transmissi

3. Click **Save**, then **Back**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection > Add > Use Field

Save **Back**

Use Field

Select Field: **HIV Risk Factor**

Column Header: **HIV Risk Factor**

Total: Group By **↓**

Sort: **↓**

Sort Priority: **0**

4. Race/Ethnicity will be the **Row**, Gender will be the **Column**, and HIV Risk Factor will be the **Strata** of the Crosstab Report. Click **Back**.

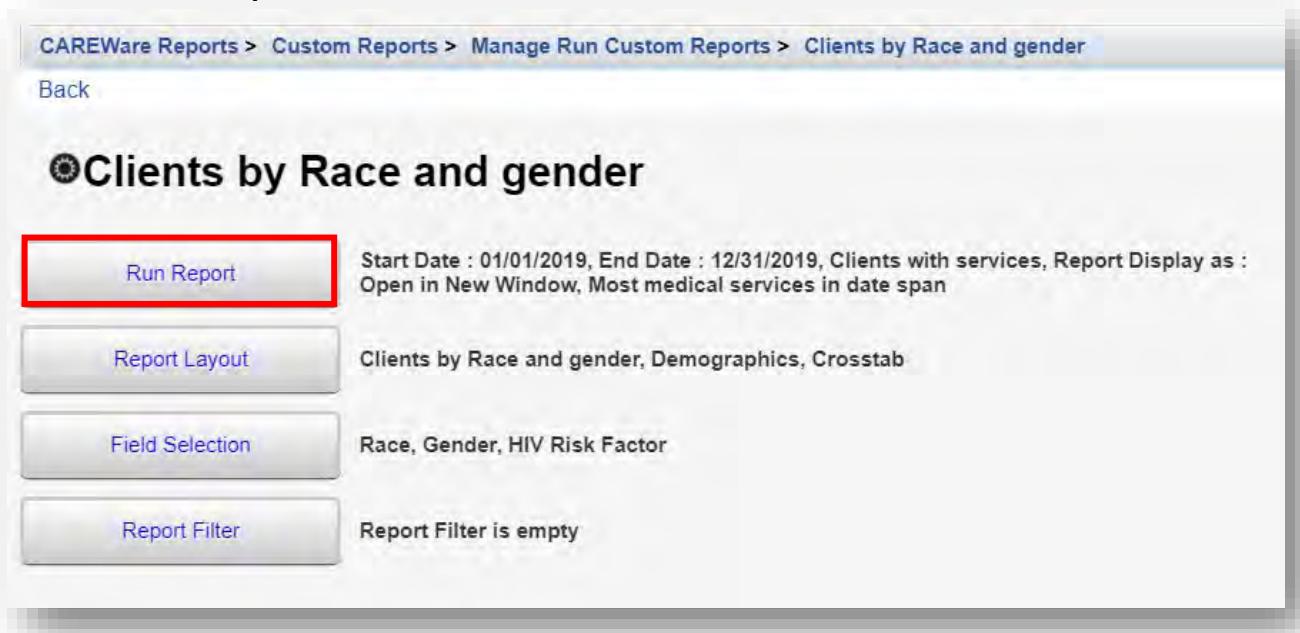
CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection

Manage Add Move Up Move Down Delete Templates **Back** Print or Export

Field Selection

Search:

Field Name	Column Header	Setup Status	Field Status
Race/Ethnicity	Race/Ethnicity	Complete	Row
Gender	Gender	Complete	Column
HIV Risk Factor	HIV Risk Factor	Complete	Strata

5. Select Run Report.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and gender

Back

Clients by Race and gender

Run Report Start Date : 01/01/2019, End Date : 12/31/2019, Clients with services, Report Display as : Open in New Window, Most medical services in date span

Report Layout Clients by Race and gender, Demographics, Crosstab

Field Selection Race, Gender, HIV Risk Factor

Report Filter Report Filter is empty

6. A sample (excerpt) Crosstab report of Race/Ethnicity by Gender and HIV Risk Factor is provided below.**IDU**

Race/Ethnicity:	Total:	Col. %:	Female:	Male:	Transgender FtM:	Transgender Mtf:
Asian	2	11.8	0	2 (100.0%)	0	0
Black or African-American	3	17.6	3 (100.0%)	0	0	0
Hispanic	5	29.4	1 (20.0%)	3 (60.0%)	0	1 (20.0%)
More than one race	2	11.8	1 (50.0%)	1 (50.0%)	0	0
White (non-Hispanic)	5	29.4	1 (20.0%)	4 (80.0%)	0	0
Total:	17	100.0	6 (35.3%)	10 (58.8%)	0 (0.0%)	1 (5.9%)

Number of Records: 6

MSM

Race/Ethnicity:	Total:	Col. %:	Female:	Male:	Transgender FtM:	Transgender Mtf:
Black or African-American	5	35.7	0	5 (100.0%)	0	0
Hispanic	4	28.6	0	3 (75.0%)	0	1 (25.0%)
More than one race	1	7.1	0	1 (100.0%)	0	0
Not Specified	1	7.1	0	1 (100.0%)	0	0
White (non-Hispanic)	3	21.4	0	3 (100.0%)	0	0
Total:	14	100.0	0 (0.0%)	13 (92.9%)	0 (0.0%)	1 (7.1%)

Number of Records: 6

CAREWare 6



Section 8:

Advanced Custom Reports

Adapted from HRSA Quick Start User Guides:
<https://hab.hrsa.gov/program-grants-management/careware>

PLEASE NOTE: The client data used in these manuals is purely fictional.

First Things First

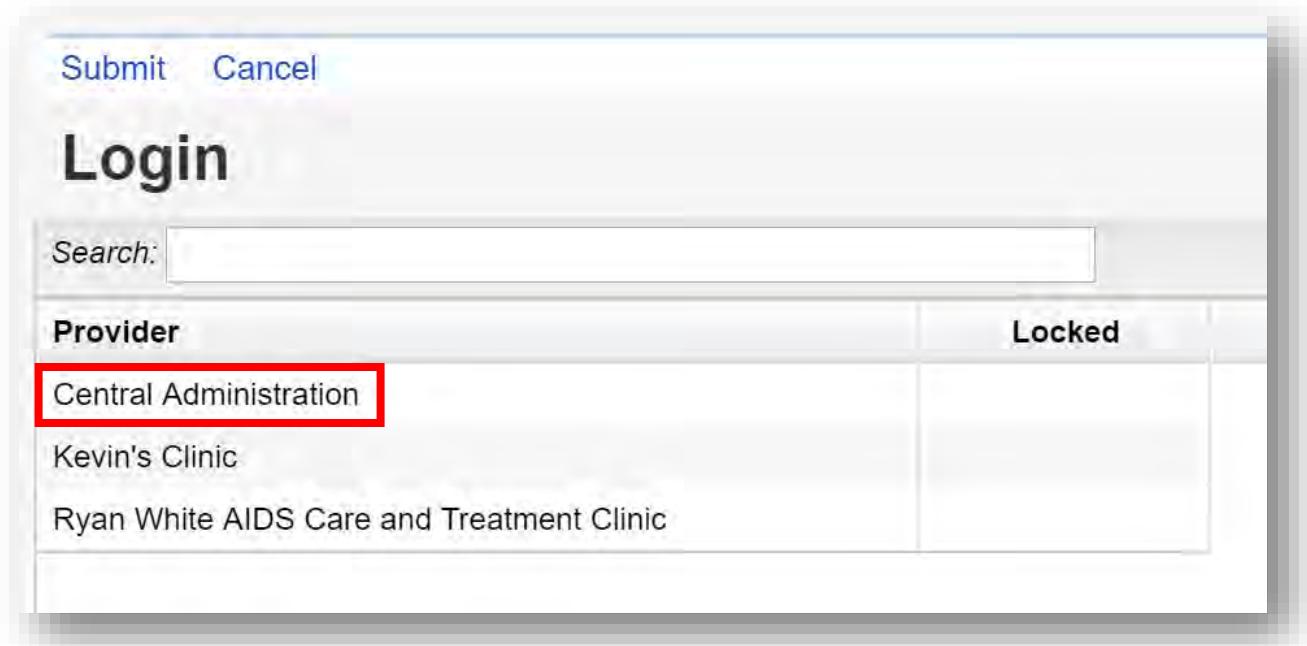
Getting Started

- You must have the appropriate user privileges to run reports.
- You should have a number of clients entered in the system so you can see how your reports will look.
- Please see Quick Start guide #7, “Basic Custom Reports,” before moving on to this guide. This manual assumes basic knowledge on creating basic custom reports.

Creating an advanced custom report

As you get comfortable with custom reports, you can create more complex reports. We will start by creating a “client list” report from the Central Administration domain.

1. Log into CAREWare. For more details on how to do so, please refer to **Quick Start Guide #1**. Choose **Central Administration**.



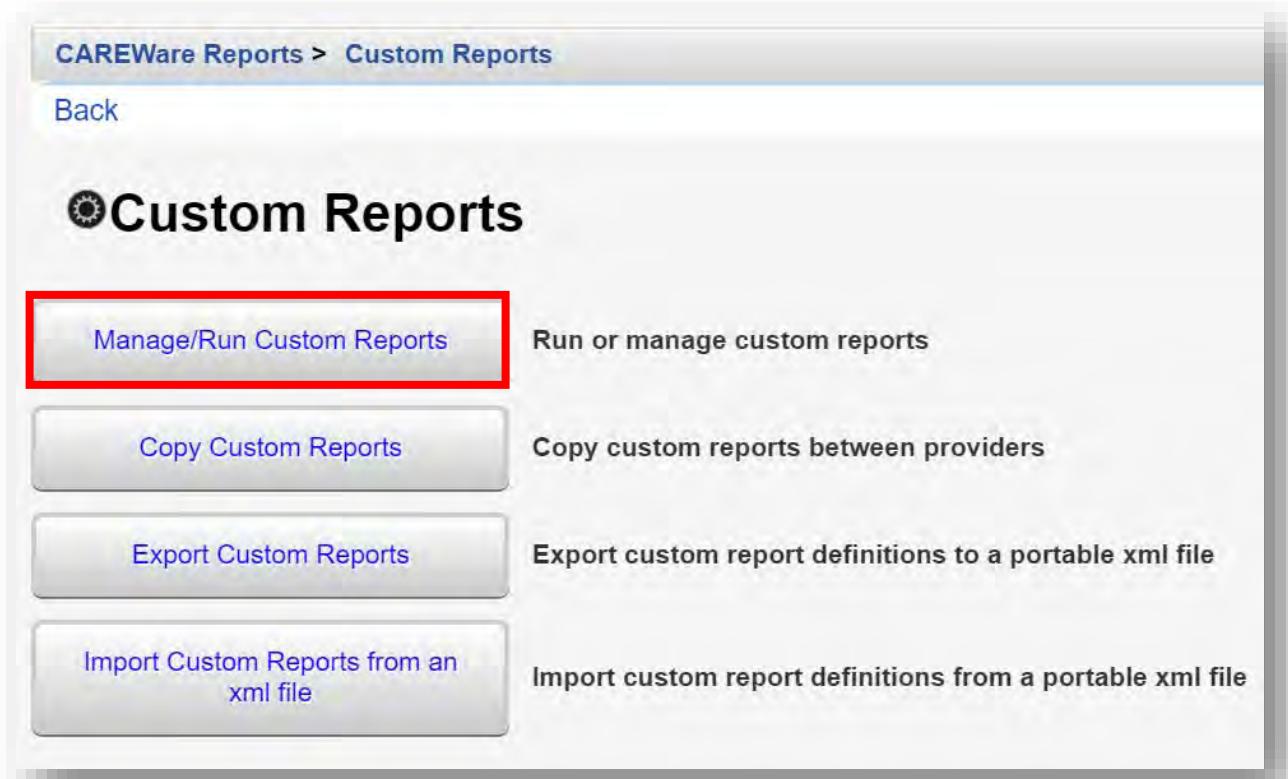
The screenshot shows a user interface for managing providers. At the top, there are 'Submit' and 'Cancel' buttons. Below that is a search bar labeled 'Search:'. The main area is a table with two columns: 'Provider' and 'Locked'. The 'Provider' column lists 'Central Administration', 'Kevin's Clinic', and 'Ryan White AIDS Care and Treatment Clinic'. The 'Locked' column shows a single checkmark next to the first provider. The row for 'Central Administration' is highlighted with a red box.

Provider	Locked
Central Administration	
Kevin's Clinic	
Ryan White AIDS Care and Treatment Clinic	

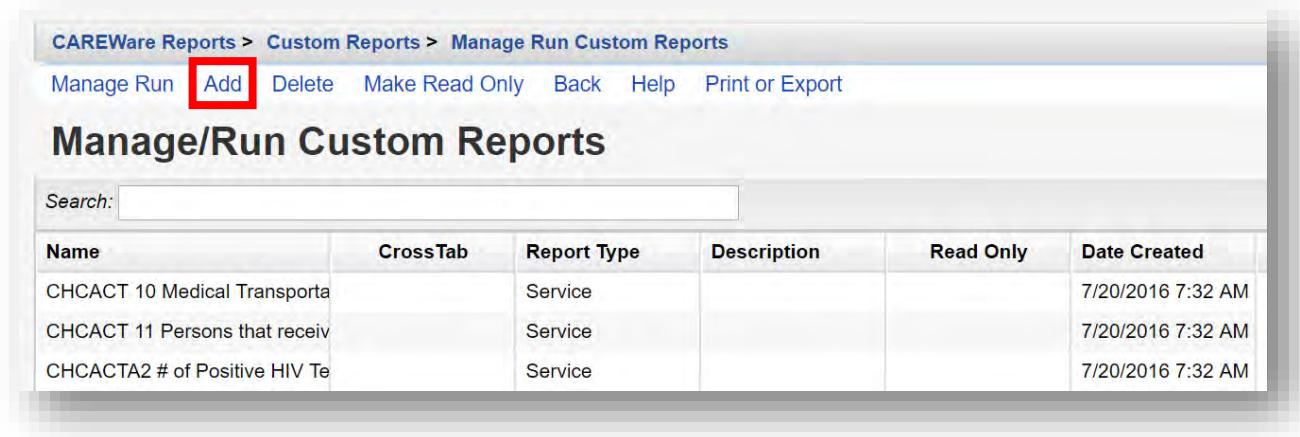
2. Select **Reports** from the Main Menu and then **Custom Reports** from the Menu of Links.



3. The Custom Reports menu will appear. Select **Manage/Run Custom Reports**.



4. Select Add from the Action bar.



CAREWare Reports > Custom Reports > Manage Run Custom Reports

Manage Run **Add** Delete Make Read Only Back Help Print or Export

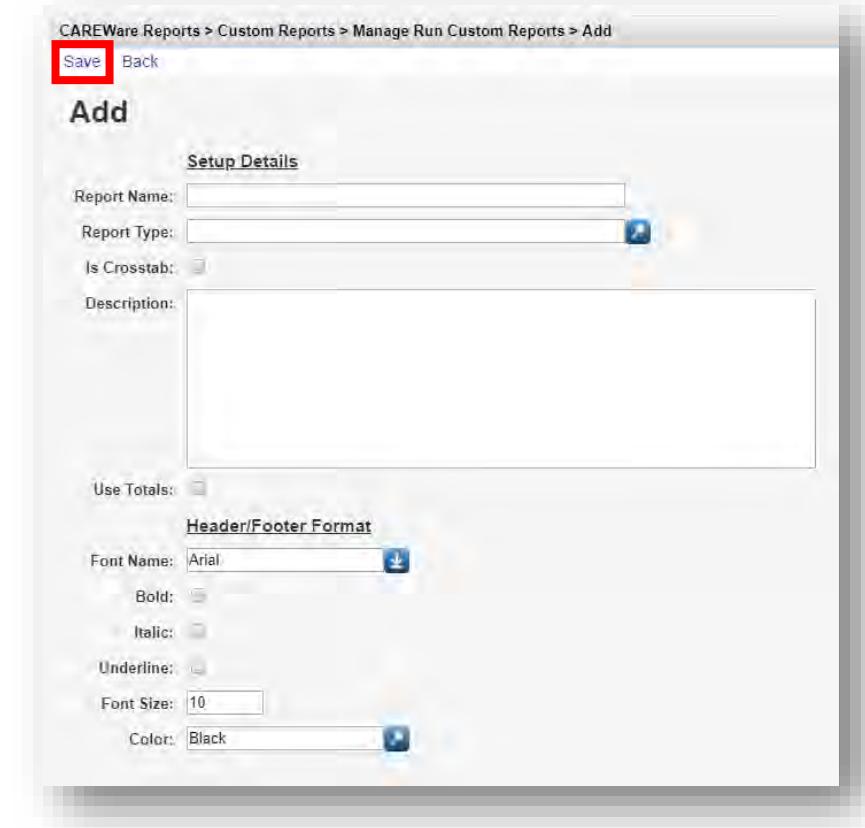
Manage/Run Custom Reports

Search:

Name	CrossTab	Report Type	Description	Read Only	Date Created
CHCACT 10 Medical Transporta		Service			7/20/2016 7:32 AM
CHCACT 11 Persons that receiv		Service			7/20/2016 7:32 AM
CHCACTA2 # of Positive HIV Te		Service			7/20/2016 7:32 AM

5. Enter in the following information (as applicable) and click **Save**.

- **Report Name**
- **Report Type**
- **Is Crosstab (checkbox)**
- **Description (optional)**
- **Use Totals (checkbox – will automatically sum total fields in the report)**
- **Header/Footer Format (optional)**



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Add

Save Back

Add

Setup Details

Report Name:

Report Type: 

Is Crosstab:

Description:

Use Totals:

Header/Footer Format

Font Name: Arial 

 Bold:

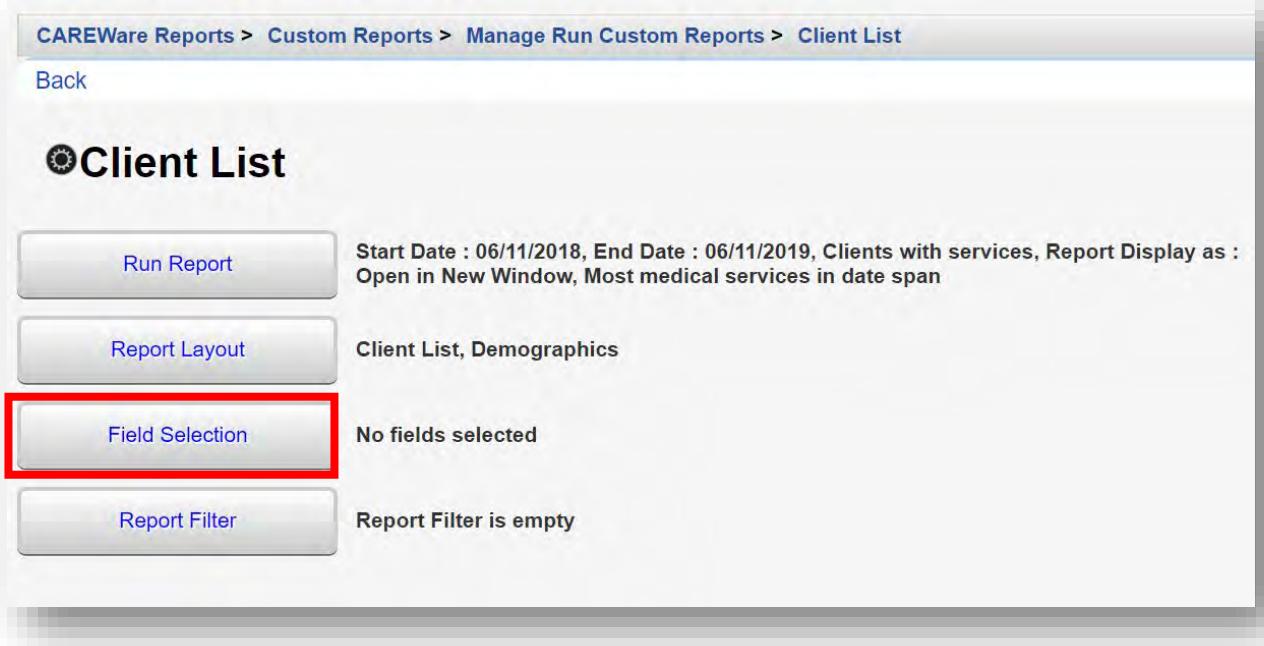
 Italic:

 Underline:

Font Size: 10 

 Color: Black 

6. Once you click save, you'll be directed to the new Custom Report menu (in this example, *Client List* is the name of our custom report). Select **Field Selection**.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List

Back

Client List

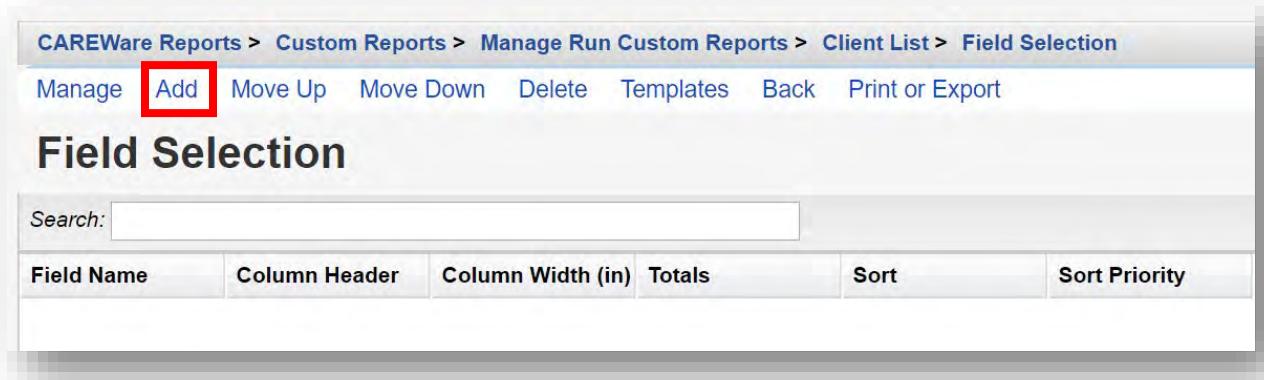
Run Report Start Date : 06/11/2018, End Date : 06/11/2019, Clients with services, Report Display as : Open in New Window, Most medical services in date span

Report Layout Client List, Demographics

Field Selection No fields selected (This button is highlighted with a red box)

Report Filter Report Filter is empty

7. Click **Add**.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Field Selection

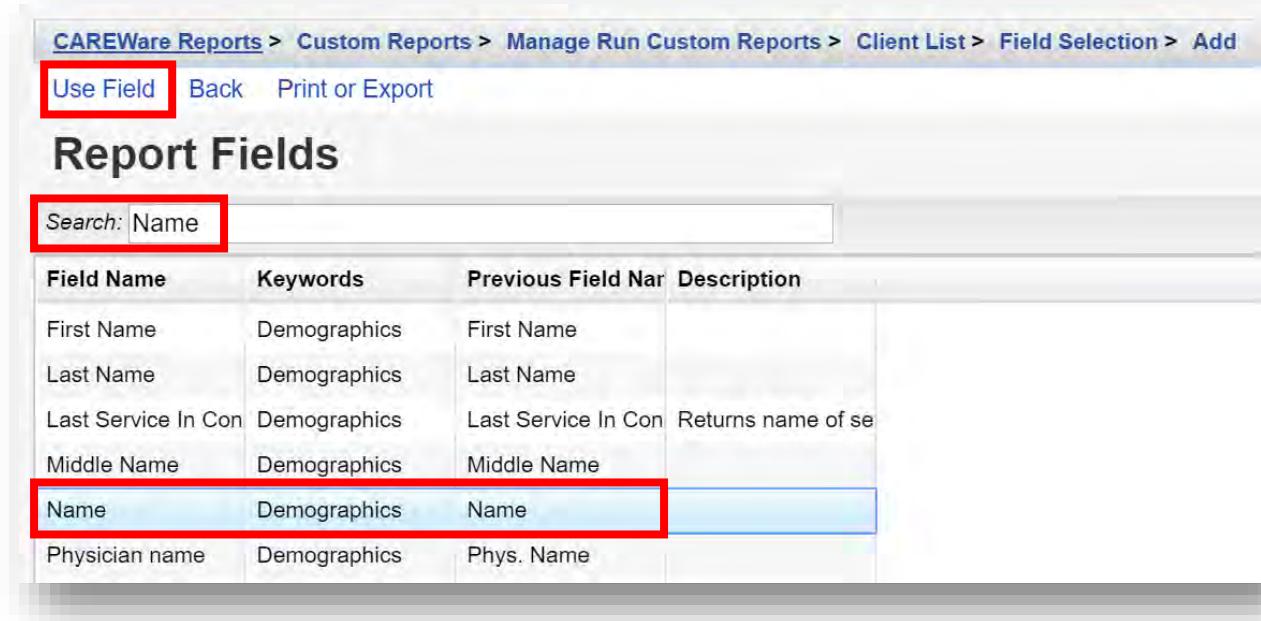
Manage **Add** Move Up Move Down Delete Templates Back Print or Export

Field Selection

Search:

Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority

8. Select **Field Name**, **Name**. Note we have entered “name” in the **Search** box to narrow the list of available field names. Click **Use Field**.



[CAREWare Reports](#) > [Custom Reports](#) > [Manage Run Custom Reports](#) > [Client List](#) > [Field Selection](#) > [Add](#)

[Use Field](#) [Back](#) [Print or Export](#)

Report Fields

Search: Name

Field Name	Keywords	Previous Field Name	Description
First Name	Demographics	First Name	
Last Name	Demographics	Last Name	
Last Service In Con	Demographics	Last Service In Con	Returns name of se
Middle Name	Demographics	Middle Name	
Name	Demographics	Name	
Physician name	Demographics	Phys. Name	

9. Select **Sort**, “Ascending” in order to display the Field Name values (in this example, client names) alphabetically in the report. Use default values for **Header Column Format** and **Data Column Format**. Click **Save**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Field Selection > Add > Use Field

Save Back

Use Field

Select Field: Name

Column Header: Name

Sort: Ascending 

Sort Priority: 1

Header Column Format

Column Width: 1.44 inches

Column Header Font Name: Arial 

 Bold: 

 Italic: 

 Underline: 

 Font Size: 8

 Font Color: Black 

Data Column Format

Font Name: Arial 

 Bold: 

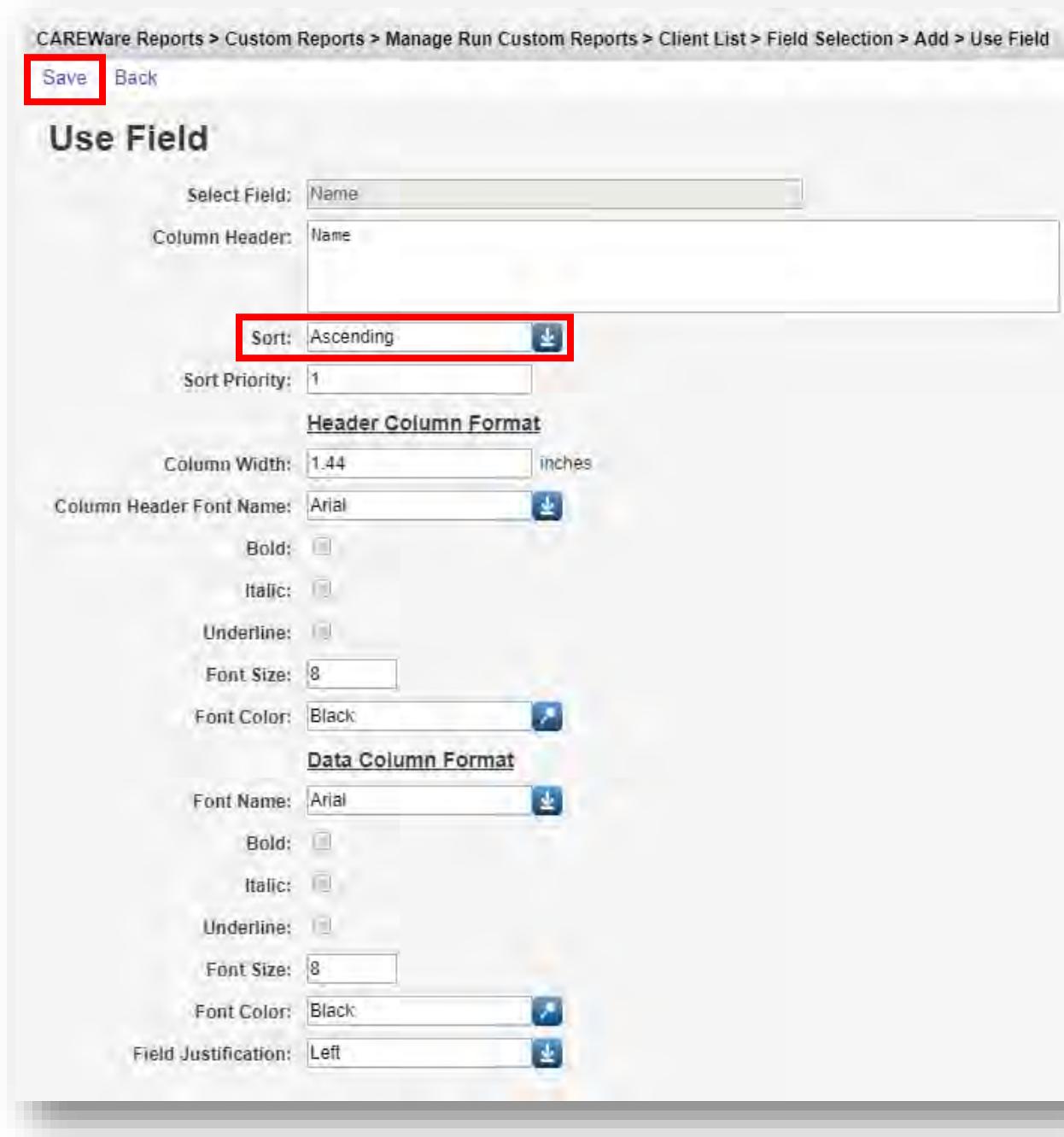
 Italic: 

 Underline: 

 Font Size: 8

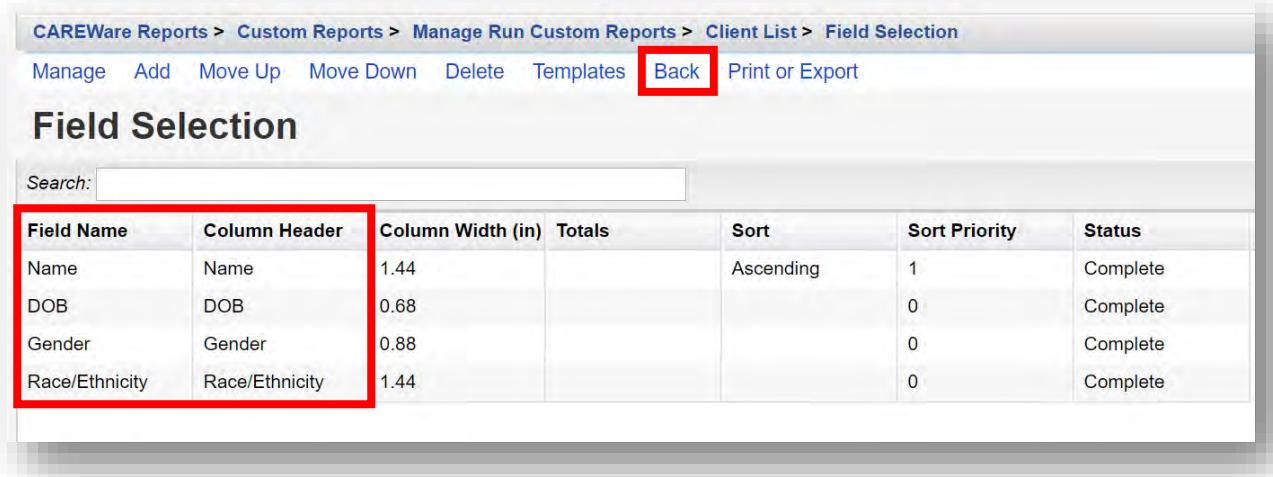
 Font Color: Black 

Field Justification: Left 



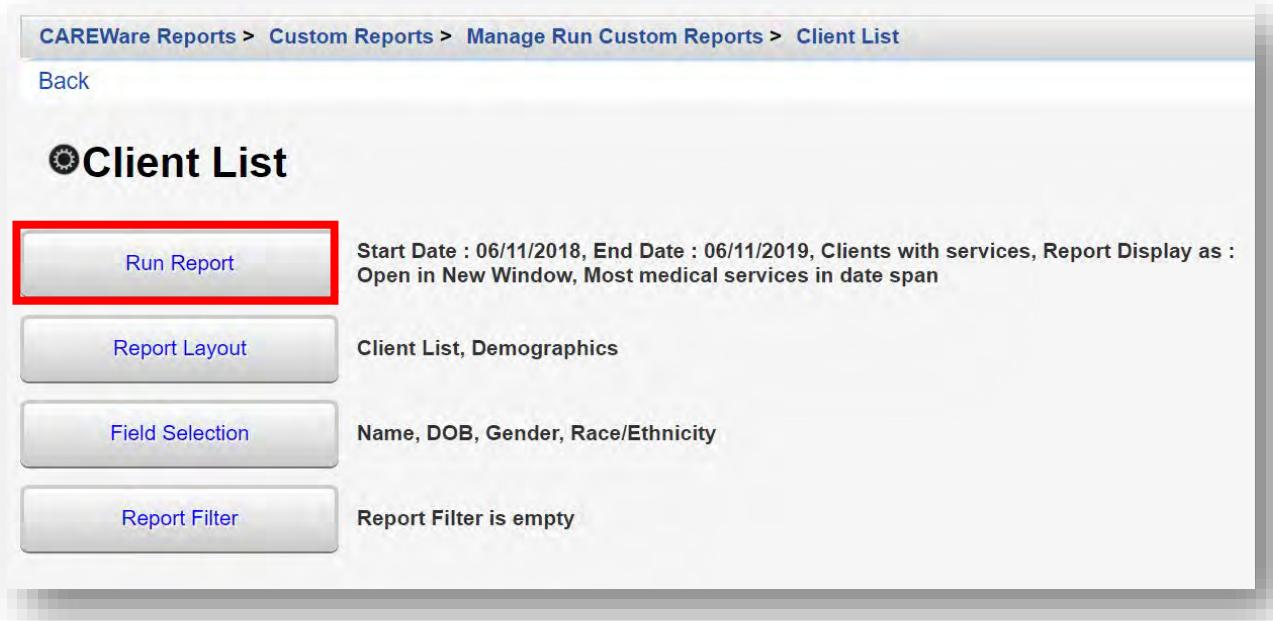
10. Repeat the same steps to add and save Field Names: *DOB*, *Gender*, and *Race/Ethnicity*.

Use default settings for these additional report fields and do not sort. When finished, the **Field Selection** should look like this:



Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status
Name	Name	1.44		Ascending	1	Complete
DOB	DOB	0.68			0	Complete
Gender	Gender	0.88			0	Complete
Race/Ethnicity	Race/Ethnicity	1.44			0	Complete

11. Click **Back** (see previous screenshot) and then select **Run Report**.



Start Date : 06/11/2018, End Date : 06/11/2019, Clients with services, Report Display as : Open in New Window, Most medical services in date span

Run Report

Report Layout

Field Selection

Report Filter

12. Click **Edit** (where Save is in the screenshot below) to change the parameters/date span as desired. Click **Save**. We have selected checkboxes for:

- **Show Clients with Service only**
- **Show Specifications**
- **Sum Numeric Fields**

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Run Report > Edit

Save [Cancel](#)

Run Report

Parameters

Date From: [Calendar](#)

Date Through: [Calendar](#)

Clinical Review Year: [Edit](#)

Output Display: [Download](#)

Show New Clients only:

Show Clients with Service only: (Selected)

Show Specifications: (Selected)

Sum Numeric Fields: (Selected)

Primary Provider: [Download](#)

Group By Provider:

Selected Providers:

13. Select Selected Providers.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Run Report

Edit **Selected Providers** Run Report Back

Run Report

Parameters

Date From:

Date Through:

Clinical Review Year:

Output Display:

Show New Clients only:

Show Clients with Service only:

Show Specifications:

Sum Numeric Fields:

Primary Provider:

Group By Provider:

Selected Providers:

14. Select the desired providers using the checkbox. Once complete, click **Save.**

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Run Report > Selected Providers

Save Select All Clear Selection Cancel Print or Export

Selected Providers

Search: Clinic

Select	Provider Name
<input checked="" type="checkbox"/>	Kevin's Clinic
<input checked="" type="checkbox"/>	Ryan White AIDS Care and Treatment Clinic

15. Select **Run Report**. Click **View Client List** in the Report generation complete box (not pictured).

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Run Report

Edit Selected Providers **Run Report** Back

Run Report

Parameters

Date From:

Date Through:

Clinical Review Year:

Output Display:

Show New Clients only:

Show Clients with Service only:

Show Specifications:

Sum Numeric Fields:

Primary Provider:

Group By Provider:

Selected Providers:

16. Below is an example report.

Client List

Data Scope: Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program

Report Start Date: 01/01/2019

Report End Date: 12/31/2019

Report Criteria: Report Filter is empty

Restrictions: Clients with services only

<u>Name:</u>	<u>DOB:</u>	<u>Gender:</u>	<u>Race/Ethnicity:</u>
Aaberg, Aaron, Morin	04/05/1992	Male	Hispanic
Aadland, Abbey,	06/27/1975	Female	More than one race
Aaland, Abdul,	08/08/1989	Male	More than one race
Adap, Sigourney,	10/19/1991	Female	Hispanic
Appleseed, Johnny,	12/05/1965	Male	Hispanic

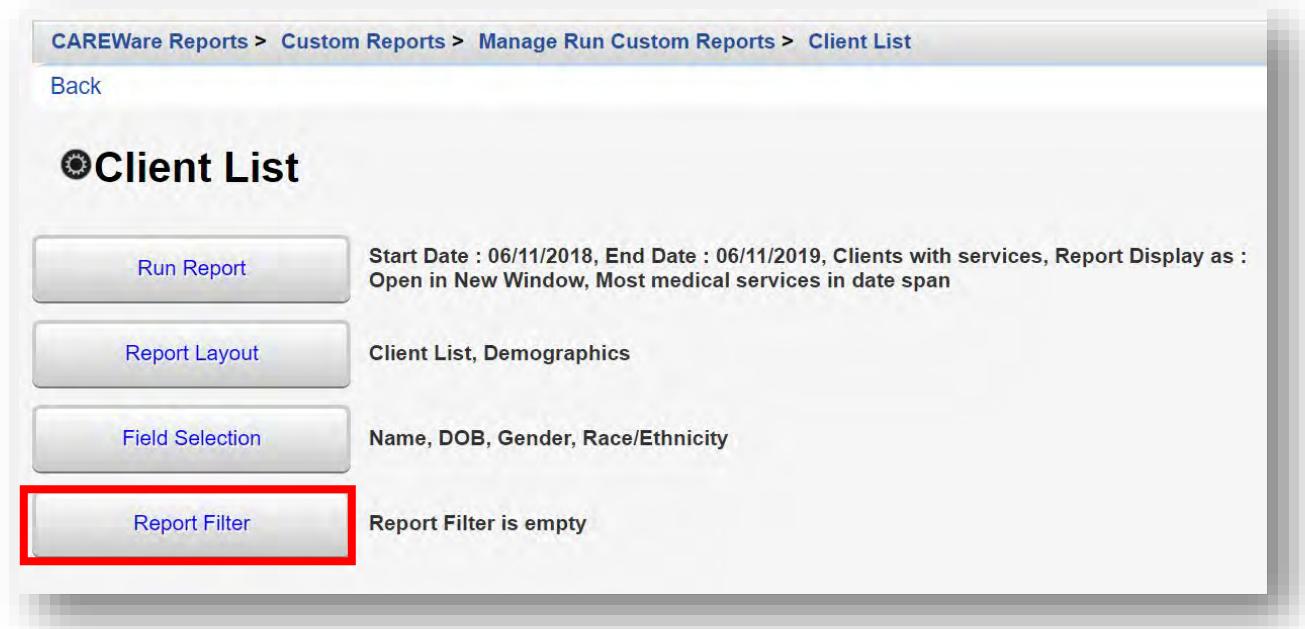


NOTE: Clients need to have at least one service visit during the date span to be included in the report. If no date span was entered, you would get a list of ALL your clients.

Adding Report Filters

Now we will add some filters to the report.

1. Select **Report Filter** from the Custom Report menu (in this example, *Client List* is the name of our custom report).



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List

Back

Client List

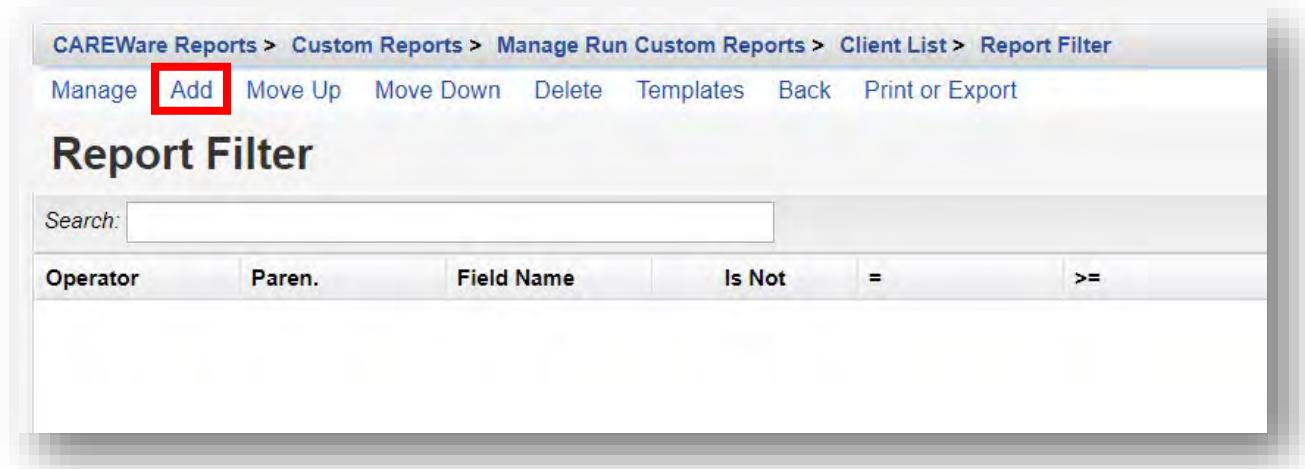
Run Report Start Date : 06/11/2018, End Date : 06/11/2019, Clients with services, Report Display as : Open in New Window, Most medical services in date span

Report Layout Client List, Demographics

Field Selection Name, DOB, Gender, Race/Ethnicity

Report Filter Report Filter is empty

2. Click **Add** from the Action bar.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Report Filter

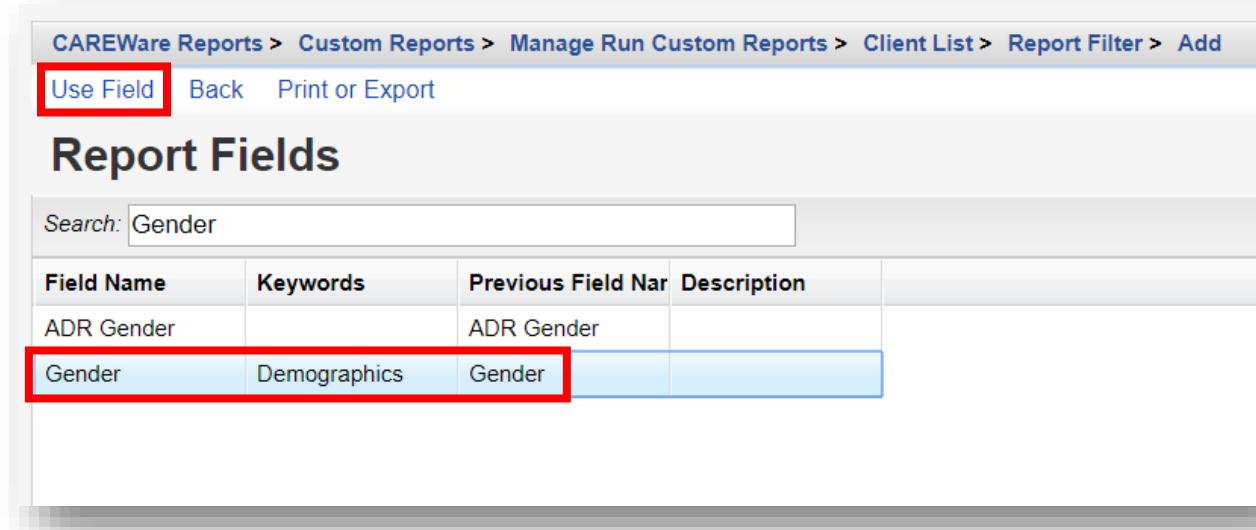
Manage **Add** Move Up Move Down Delete Templates Back Print or Export

Report Filter

Search:

Operator	Paren.	Field Name	Is Not	=	>=

3. Select **Gender** from the **Field Name** column (use the search bar to narrow your results, if desired). Click **Use Field**.



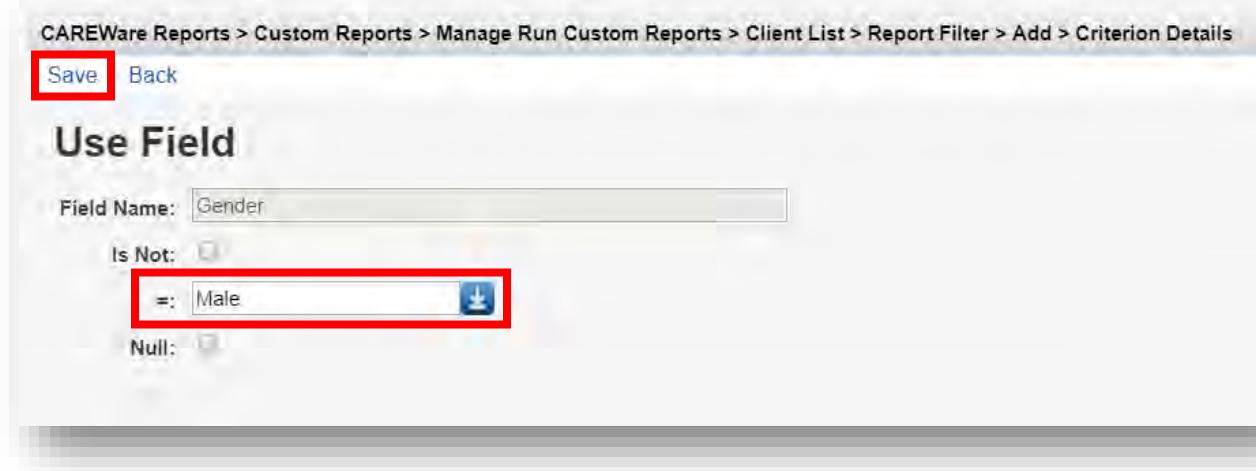
CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Report Filter > Add

Use Field Back Print or Export

Report Fields

Field Name	Keywords	Previous Field Name	Description
ADR Gender		ADR Gender	
Gender	Demographics	Gender	

4. Enter in the desired criterion. In this example, we are filtering for clients who identify as Male. Click **Save**.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Report Filter > Add > Criterion Details

Save Back

Use Field

Field Name: Gender

Is Not:

Null:

5. Click **Back** from the Report Filter screen to return to the Custom Report menu.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Report Filter

Manage Add Move Up Move Down Delete Templates **Back** Print or Export

Report Filter

Search:

Operator	Paren.	Field Name	Is Not	=	>=
		Gender		Male	

6. Select **Run Report** and then follow the steps on pages 9 through 11 (beginning with step 12). Once you run the report, you will now note that only "Male" clients are included.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List

Back

Client List

Run Report Start Date : 06/11/2018, End Date : 06/11/2019, Clients with services, Report Display as : Open in New Window, Most medical services in date span

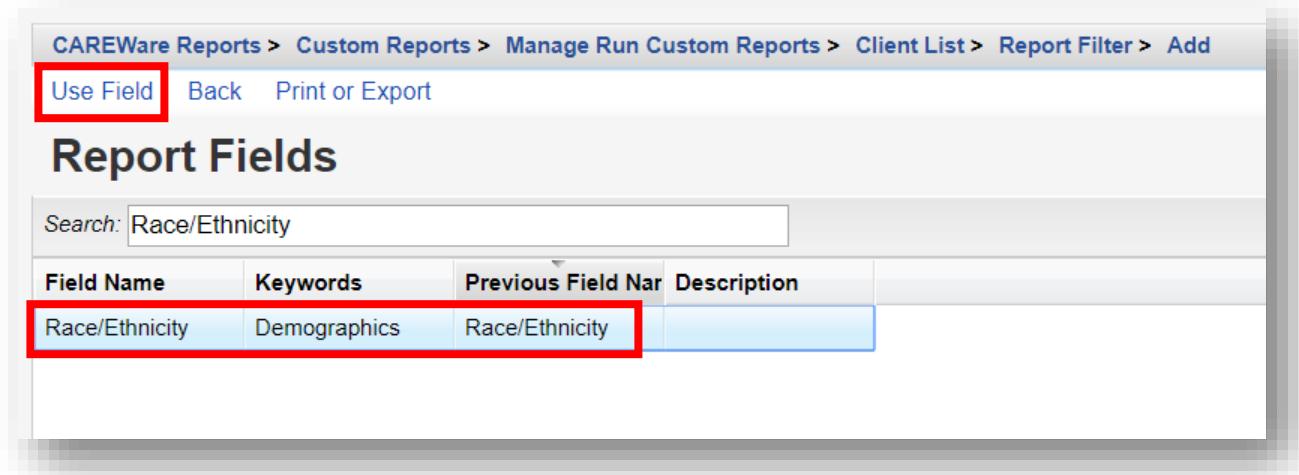
Report Layout Client List, Demographics

Field Selection Name, DOB, Gender, Race/Ethnicity

Report Filter Gender = Male

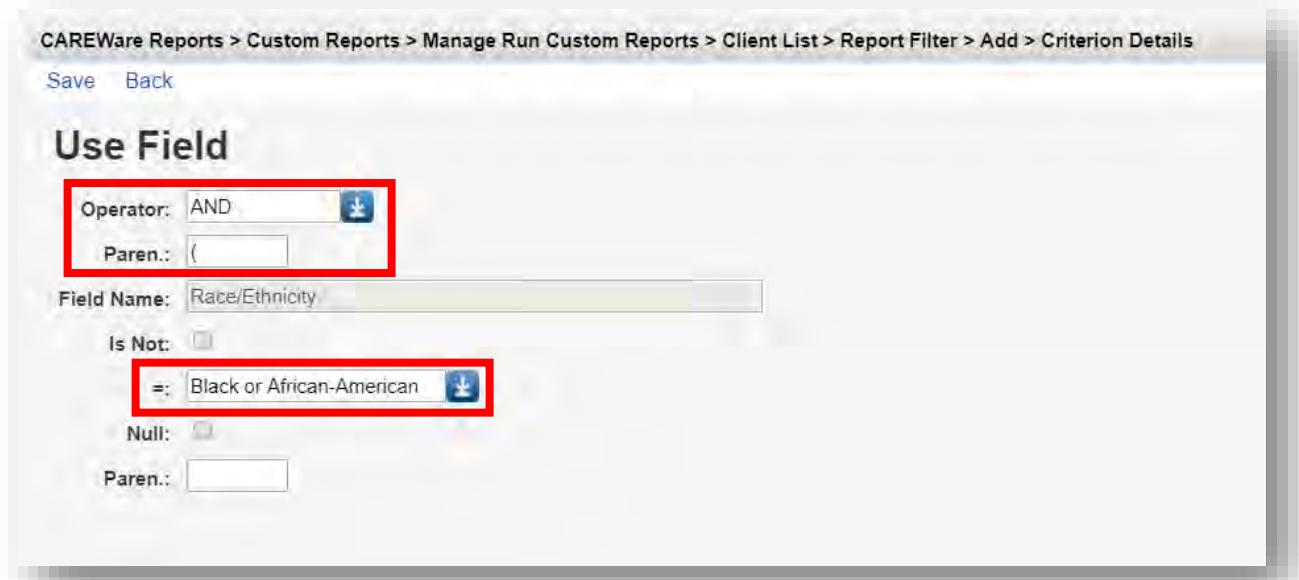
We will now use the AND / OR operators in our report criteria:

7. Follow steps 1 and 2 on page 13 to return to the Report Fields menu and search for the field name "Race/Ethnicity." Select the field name and click **Use Field** from the Action bar.



The screenshot shows the 'Report Fields' screen. At the top, there is a breadcrumb navigation: CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Report Filter > Add. Below the breadcrumb, there are buttons for 'Use Field' (which is highlighted with a red box), 'Back', and 'Print or Export'. The main area is titled 'Report Fields' and contains a search bar with the text 'Race/Ethnicity'. A table lists report fields with columns: Field Name, Keywords, Previous Field Nar, and Description. A single row is selected, showing 'Race/Ethnicity' in the Field Name column, 'Demographics' in the Keywords column, and 'Race/Ethnicity' in the Previous Field Nar column. The entire row is highlighted with a red box.

8. Use the Operator field to choose between "And" or "Or." The Paren field is used to define additional report filter criteria within the parenthesis. In this example, we are using the "And" operator and only filtering for clients whose race/ethnicity is Black or African-American (the selection is made from the drop down list within the "=" field). The first "open" Paren field denotes that the race/ethnicity must be Black or African American. Click **Save**.



The screenshot shows the 'Use Field' dialog box. At the top, there are buttons for 'Save' and 'Back'. The main area is titled 'Use Field' and contains several input fields:

- 'Operator:' dropdown set to 'AND' (highlighted with a red box).
- 'Paren.: ([])' input field (highlighted with a red box).
- 'Field Name:' dropdown set to 'Race/Ethnicity'.
- 'Is Not:' checkbox (unchecked).
- '=: Black or African-American' dropdown (highlighted with a red box).
- 'Null:' checkbox (unchecked).
- 'Paren.: []' input field.

9. Repeat the previous step except this time, use the “Or” operator and include clients whose race/ethnicity is Hispanic. This time, the second “closed” Paren field (while using the “Or” operator) denotes that the race/ethnicity could be Hispanic.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List >

Save Cancel

Edit

Operator: OR

Paren.:

Field Name: Race/Ethnicity

Is Not:

=: Hispanic

Null:

Paren.:

The *Client List* criteria are listed next to the Report Filter in the Link Summary. For the client to be listed on the report, they would need to be Male AND Black/African American OR Hispanic.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List

Back

Client List

Run Report Start Date : 01/01/2019, End Date : 12/31/2019, Clients with services, Report Display as : Open in New Window, Most medical services in date span

Report Layout Client List, Demographics

Field Selection Name, DOB, Gender, Race/Ethnicity

Report Filter Gender = Male AND Race/Ethnicity = Black or African-American OR Race/Ethnicity = Hispanic

In addition to the other report parameters and restrictions, they would also need to have received a service in the 2019 reporting year (calendar year).

Client List

Data Scope:	Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program		
Report Start Date:	01/01/2019		
Report End Date:	12/31/2019		
Report Criteria:	Gender = Male AND Race/Ethnicity = Black or African-American OR Race/Ethnicity = Hispanic		
Restrictions:	Clients with services only		
<u>Name:</u>	<u>DOB:</u>	<u>Gender:</u>	<u>Race/Ethnicity:</u>
Aaberg, Aaron, Morin	04/05/1992	Male	Black or African-American
Appleseed, Johnny,	12/05/1965	Male	Hispanic
Cesar, Rex,	06/30/1987	Male	Hispanic
Fish, Blue,	04/12/1990	Male	Hispanic
Ghost, Caspar,	11/19/1974	Male	Hispanic
Kranepool, Bob,	12/21/1955	Male	Hispanic
Smith, Dominic,	01/01/1990	Male	Black or African-American

Using Totals

NOTE: The following sections assume you are now comfortable creating field selections and filters. We will show you what your field selections and filters should look like, but we'll now skip walking through each step to create them.

If you need to sum certain values or group the report in a specific way (e.g. over clients or service categories), you can check the **Use Totals** on the **Report Layout** link. **Use Totals** also includes functions to calculate the minimum or maximum or average of a group of observations, such as CD4 or Viral Load counts.

We'll do two examples of the Use Totals function, one for a custom service report where there are often multiple services per client, and one for a custom lab report, where there are often multiple lab tests per individual.

Service Report (with totals)

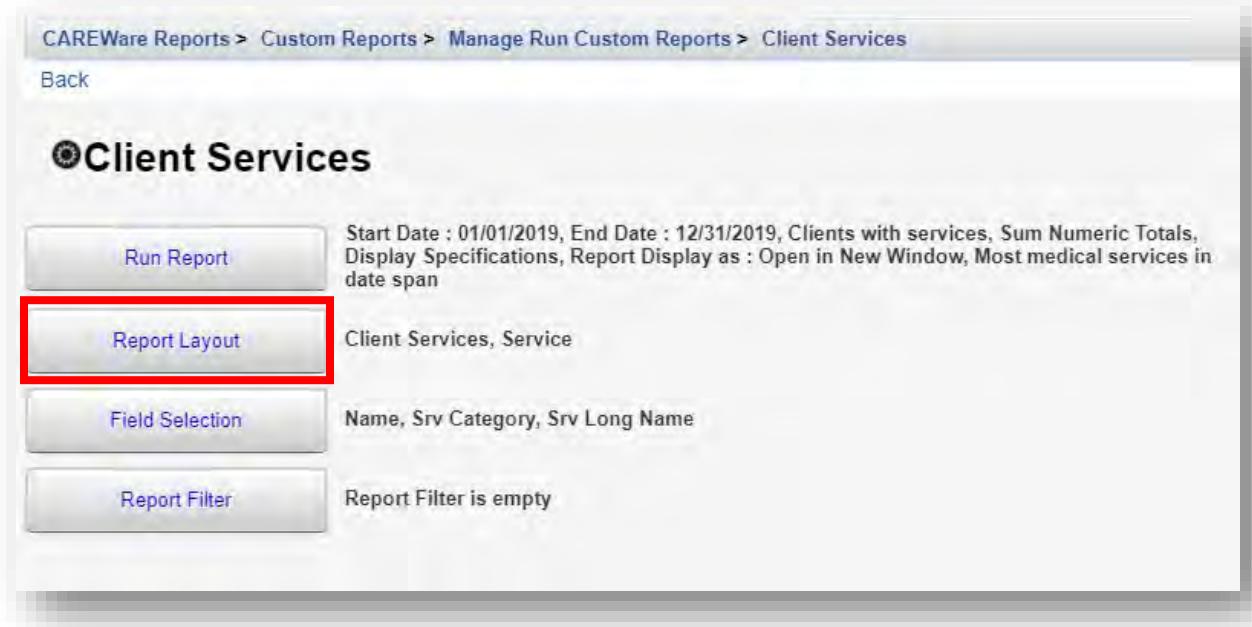
1. Here is the top portion of a basic custom service report (fields "Name," "Srv Category," and "Srv Long Name") sorted in "Ascending" order by client.

Client Services

Data Scope:	Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program	
Report Start Date:	01/01/2019	
Report End Date:	12/31/2019	
Report Criteria:	Report Filter is empty	
Restrictions:	Clients with services only	
Name:	Srv Category:	Srv Long Name:
Aaberg, Aaron Morin	Oral Health Care	Oral Health Care
Aadland, Abbey	Medical Case Management	MCM Non Face-to-face
Aadland, Abbey	Medical Case Management	MCM Face-to-face
Aaland, Abdul	Medical Case Management	Medical Case Management
Adap, Sigourney	Medical Case Management	Assessment/CMF
Appleseed, Johnny	Medical Case Management	MCM Non Face-to-face
Appleseed, Johnny	Medical Case Management	MCM Face-to-face
Appleseed, Johnny	Early Intervention Services	EIS Outreach
Appleseed, Johnny	Early Intervention Services	EIS Outreach
Appleseed, Johnny	Early Intervention Services	EIS Outreach

You can see that some clients appear multiple times on the report, because they've received multiple services in the date range.

2. Select **Report Layout** from the Custom Report menu (in this example, *Client Services* is the name of our custom report).



3. Click **Edit** (will be where Save is in the below screenshot) and then check the **Use Totals** box. Click **Save**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client Services > Report Layout > Edit

[Save](#) [Cancel](#)

Edit

Layout Details

Report Name:

Report Type:

Is Crosstab:

Description:

Read Only:

Use Totals:

Header/Footer Format

Font Name: 

Bold:

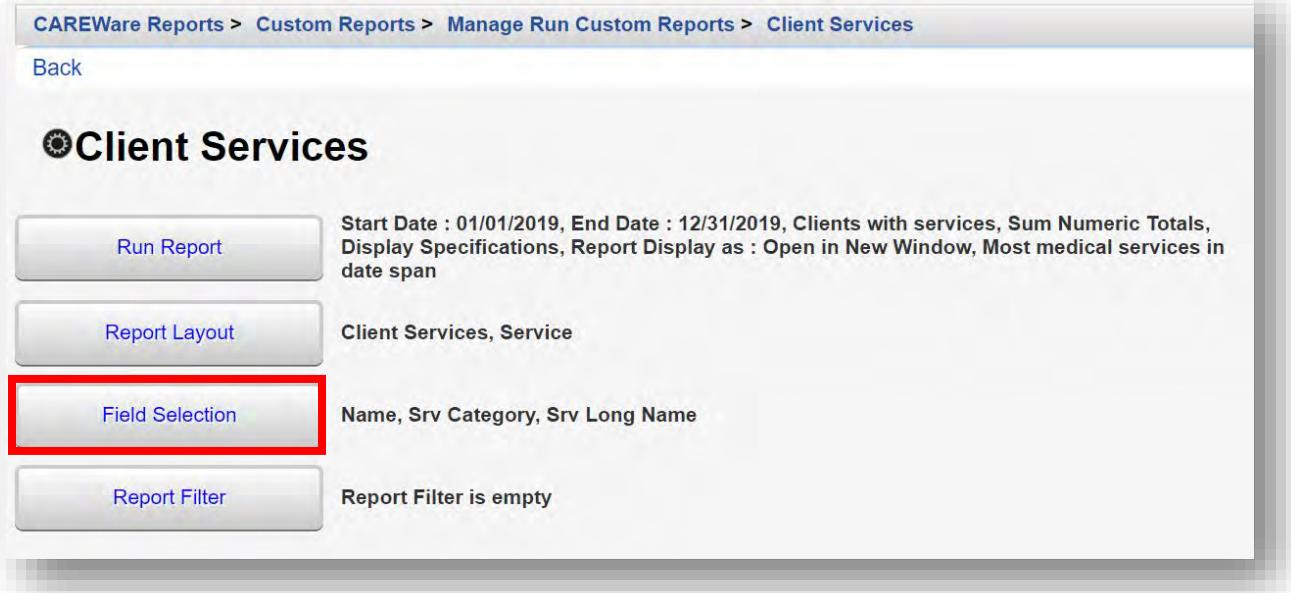
Italic:

Underline:

Font Size:

Color: 

4. Click on the **Field Selection** Link.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client Services

Back

Client Services

Start Date : 01/01/2019, End Date : 12/31/2019, Clients with services, Sum Numeric Totals, Display Specifications, Report Display as : Open in New Window, Most medical services in date span

Run Report

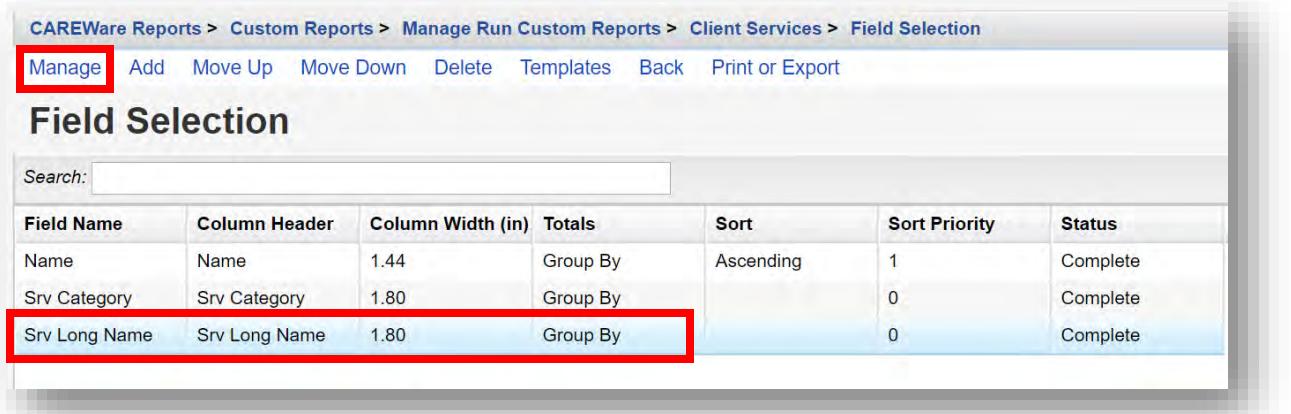
Report Layout Client Services, Service

Field Selection (highlighted with a red box)

Name, Srv Category, Srv Long Name

Report Filter Report Filter is empty

5. Highlight the Field Name (in this example, *Srv Long Name*) and click **Manage** from the Action bar.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client Services > Field Selection

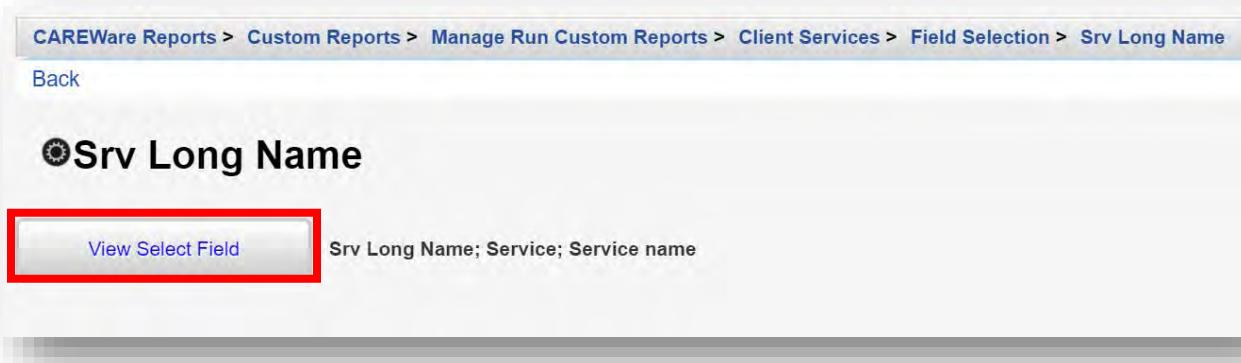
Manage Add Move Up Move Down Delete Templates Back Print or Export

Field Selection

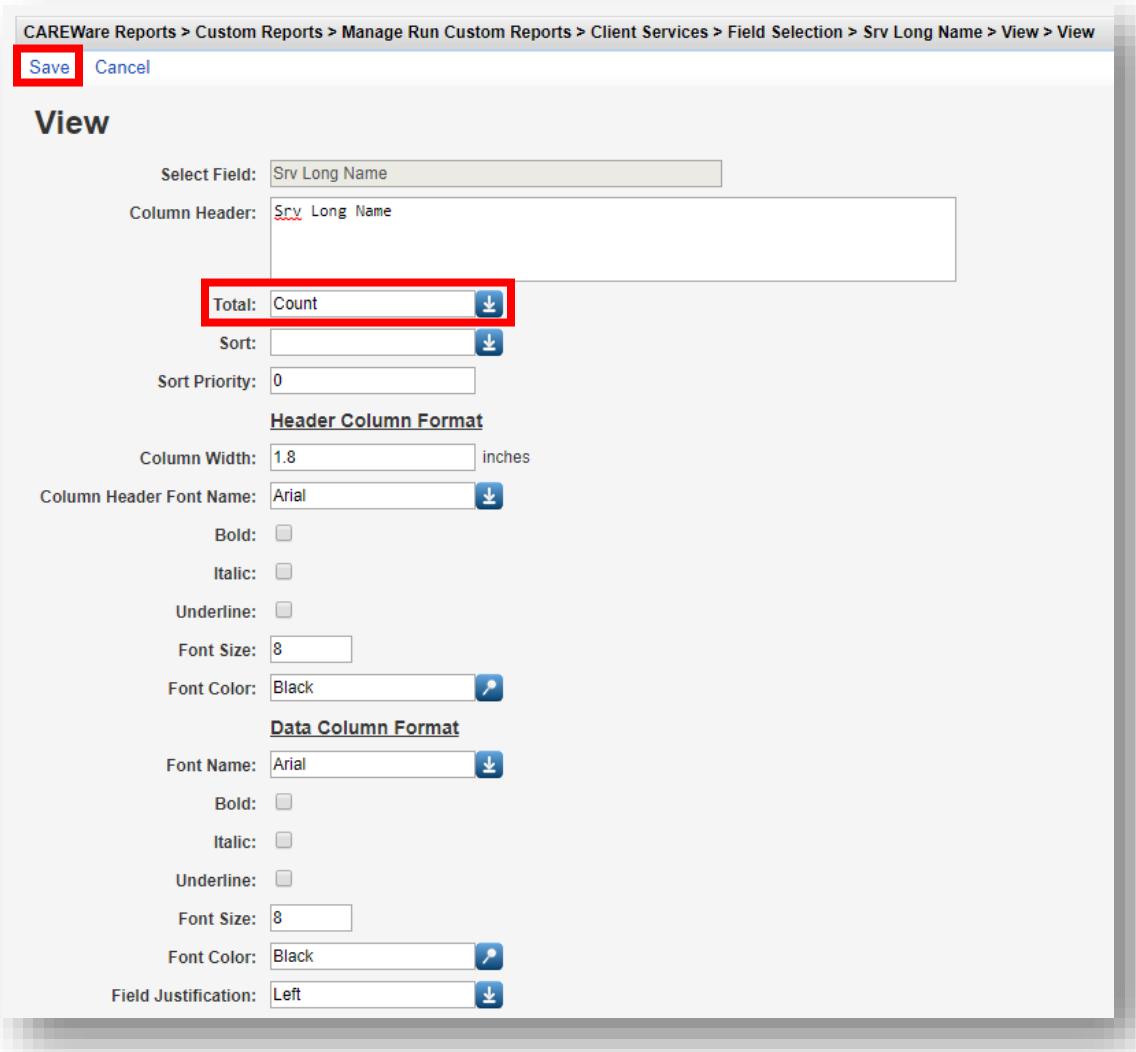
Search:

Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status
Name	Name	1.44	Group By	Ascending	1	Complete
Srv Category	Srv Category	1.80	Group By		0	Complete
Srv Long Name	Srv Long Name	1.80	Group By		0	Complete

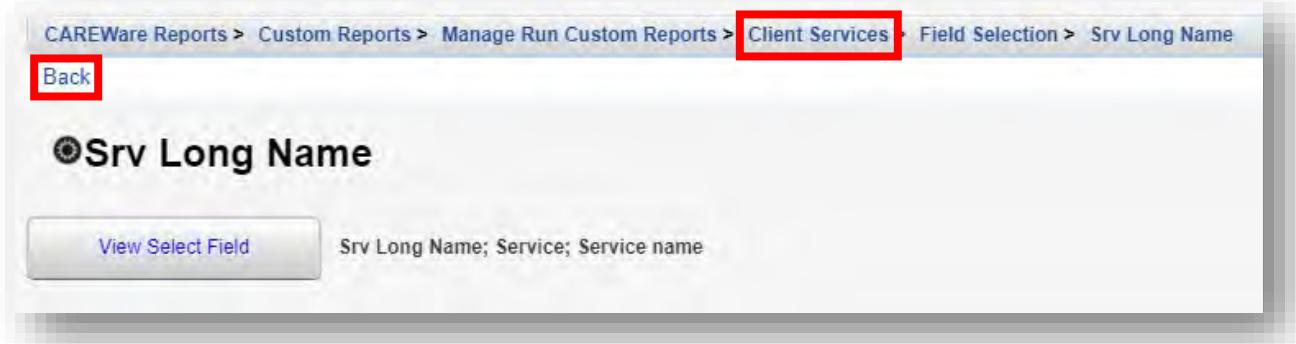
6. Click View Select Field.



7. Click **Edit** (will be where Save is in the below screenshot) and then change the Total field, from *Group By* to *Count* in the drop-down box. Click **Save**.

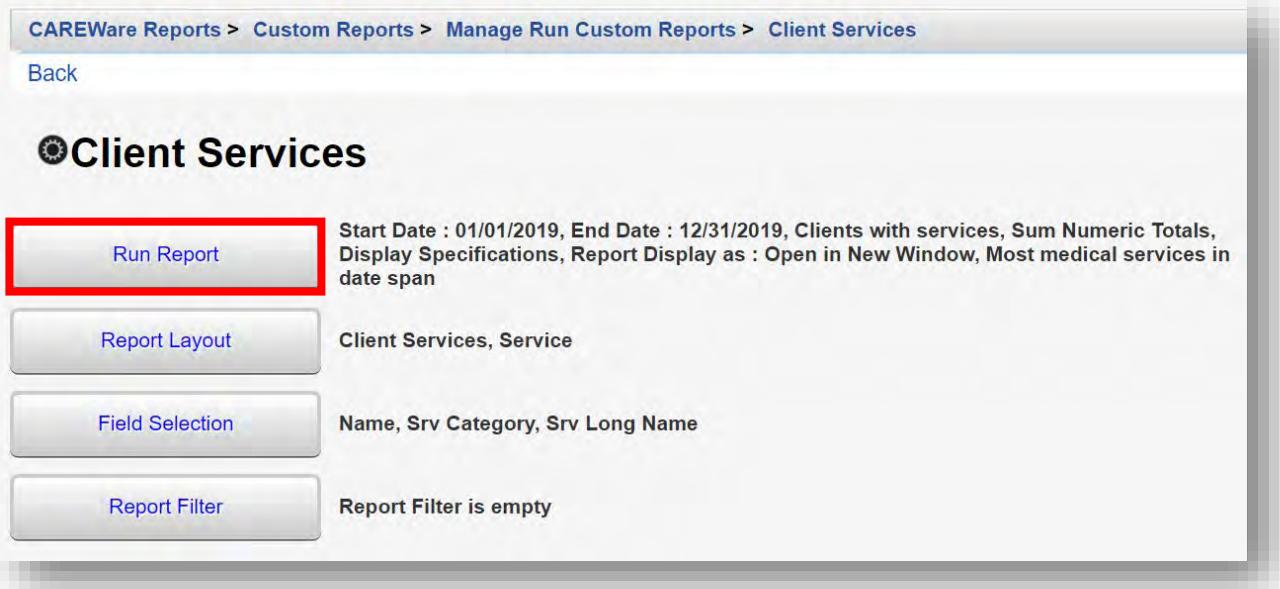


8. Return to the Custom Report menu by clicking **Back** twice or clicking on the report's name within the Breadcrumb links.



The screenshot shows a web-based application interface for CAREWare Reports. The breadcrumb navigation at the top reads: CAREWare Reports > Custom Reports > Manage Run Custom Reports > **Client Services** (highlighted with a red box) > Field Selection > Srv Long Name. Below the breadcrumb, there is a 'Back' link. The main content area is titled 'Srv Long Name' with a subtitle 'Srv Long Name; Service; Service name'. A 'View Select Field' button is visible.

9. Re-run the “Client Services” report.



The screenshot shows the 'Client Services' report configuration page. The breadcrumb path is: CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client Services. A 'Back' link is present. The main title is 'Client Services'. A 'Run Report' button is highlighted with a red box. Below it, the report parameters are listed: Start Date : 01/01/2019, End Date : 12/31/2019, Clients with services, Sum Numeric Totals, Display Specifications, Report Display as : Open in New Window, Most medical services in date span. Other buttons include 'Report Layout' (Client Services, Service), 'Field Selection' (Name, Srv Category, Srv Long Name), and 'Report Filter' (Report Filter is empty).

The report now returns the total subservices a client receives within a service category. Notice for the client Abbey Aadland, there is now only one line for Medical Case Management, with the number 2 in the Srv Long Name column, indicating how many of those services were received in the date span.

Client Services		
Data Scope:	Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program	
Report Start Date:	01/01/2019	
Report End Date:	12/31/2019	
Report Criteria:	Report Filter is empty	
Restrictions:	Clients with services only	
<u>Name:</u>	<u>Srv Category:</u>	<u>Srv Long Name:</u>
Aaberg, Aaron Morin	Oral Health Care	1
Aadland, Abbey	Medical Case Management	2
Aaland, Abdul	Medical Case Management	1
Adap, Sigourney	Medical Case Management	1
Appleseed, Johnny	Early Intervention Services	3
Appleseed, Johnny	Medical Case Management	2

Lab Report (with totals)

1. Here is the Field Selection setup of a basic custom report (fields "Name", "Lab Result"), sorted "Ascending" by client.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client CD4 Count > Field Selection						
Manage Add Move Up Move Down Delete Templates Back Print or Export						
Field Selection						
Search: <input type="text"/>						
Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status
Name	Name	1.44	Group By	Ascending	1	Complete
Lab Result	Lab Result	0.70	Group By		0	Complete

2. Change the **Total** field in the Field Name “Lab Result” from *Group By* to *Min* in the drop-down box.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client CD4 Count > Field Selection > Lab Result > View > View

Save Cancel

View

Select Field: Lab Result

Column Header: Lab Result

Total: **Group By** 

Sort: Average

Sort Priority: Count

Group By

Column Width: Max

Column Header Font Name: **Min**

Bold:

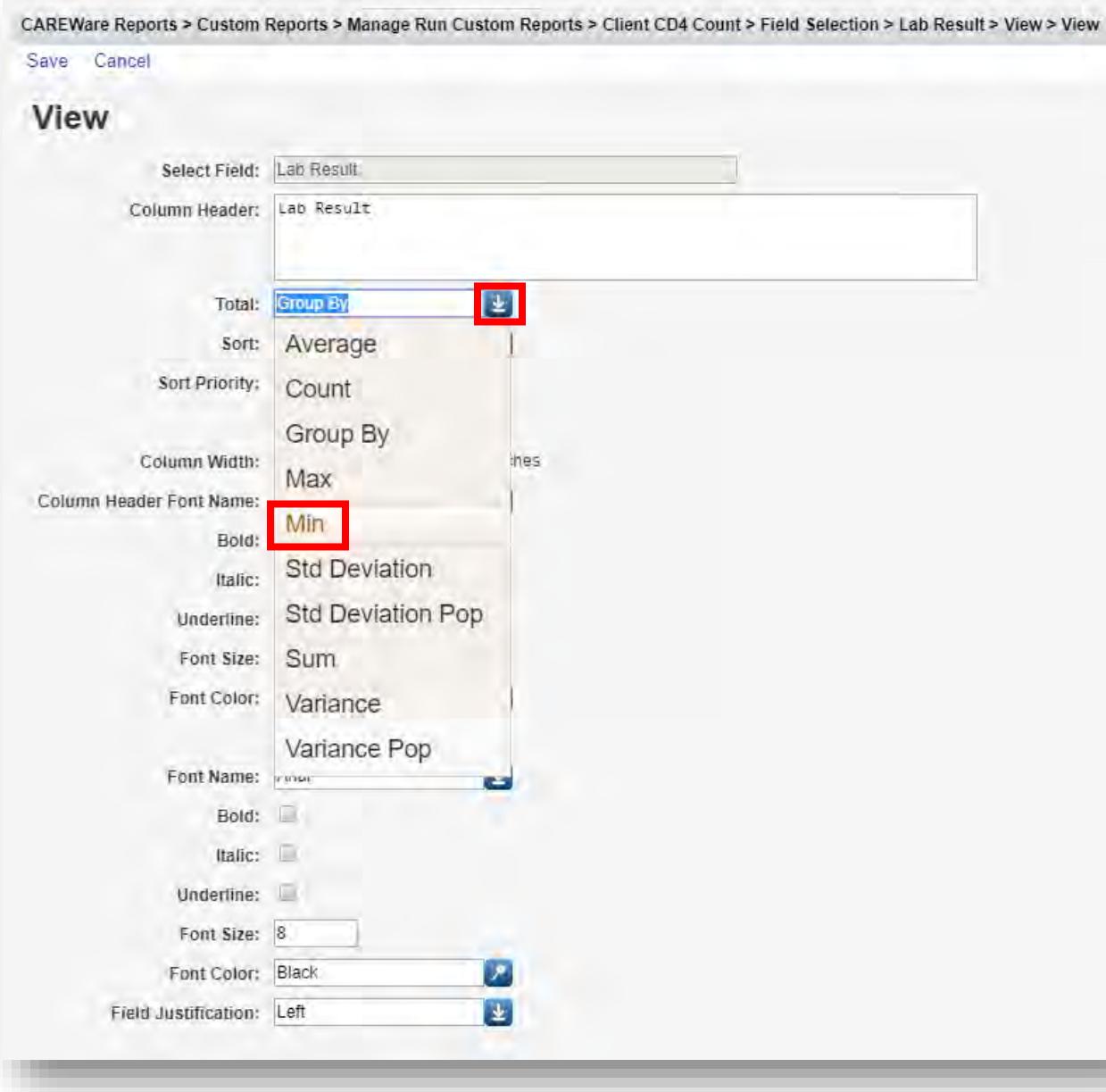
Italic:

Underline:

Font Size: 8

Font Color: Black 

Field Justification: Left 



3. Below is an example of the “Client CD4 Count” custom lab report with *Min* total used.

Client CD4 Count	
Data Scope:	Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program
Report Start Date:	01/01/2019
Report End Date:	12/31/2019
Report Criteria:	Report Filter is empty
Restrictions:	Clients with services only
Name:	Lab Result:
Appleseed, Johnny	300
Beagle, Barney J	1
Brown, Buster j	45
Cesar, Rex	221
Client, Natalia S	900

Using Calculated Objects in Custom Reports

The ability to analyze changes in lab results and other indicators is available with the addition of calculated objects fields in CAREWare.

Using calculated objects will allow you to determine:

- The highest and lowest quantitative lab value within a specified date range
- The change in lab values from one period to the next (e.g., how much did a client's CD4 count or viral load increase or decrease?)
- The first medical service after HIV diagnosis with a specified date range

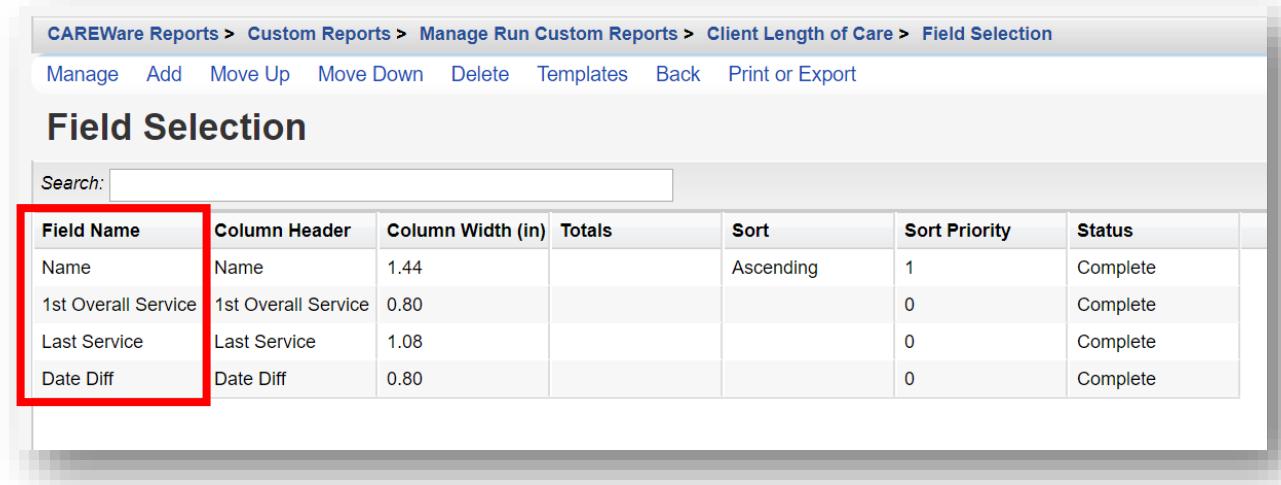
Setting up date ranges for comparison

Say you want to look at how long your clients have been receiving services.

There is a calculated object field that will look at the first service date and compare that to the last service date and calculate the difference between them.

In custom demographic reports, we select one of the calculated objects as one of our report fields.

1. Add a new custom *Demographic* report (see *Creating an advanced custom report* on page 2). We have named the report "Client Length of Care" in this example.
2. Use the following Field Names within the Field Selection menu: "Name," "1st Overall Service," "Last Service," and "Date Diff." For a refresher on how to access the Field Selection menu and how to add fields, please see page 5 through 8.



The screenshot shows the CAREWare Field Selection interface for the 'Client Length of Care' report. The top navigation bar includes 'CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client Length of Care > Field Selection'. Below the navigation are buttons for 'Manage', 'Add', 'Move Up', 'Move Down', 'Delete', 'Templates', 'Back', 'Print or Export'. The main area is titled 'Field Selection' and contains a table with the following data:

Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status
Name	Name	1.44		Ascending	1	Complete
1st Overall Service	1st Overall Service	0.80			0	Complete
Last Service	Last Service	1.08			0	Complete
Date Diff	Date Diff	0.80			0	Complete

A red box highlights the first four rows of the table, corresponding to the fields 'Name', '1st Overall Service', 'Last Service', and 'Date Diff' mentioned in the text above.

3. When adding the “Date Diff” field, use the following parameters:

- 1. **DateColumn** = *1st Overall Service* from the drop-down box
- 2. **DateColumn** = *Last Service* from the drop-down box
- 3. **Diff Type** = *Months* from the drop-down box
- 4. **Cross-Provider** = *No* from the drop-down box

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client Length of Care > Field Selection > Date Diff > Subfilter

Edit Back Help

Subfilter

The following 4 criteria need completion for the subfilter

1. DateColumn
=:

2. DateColumn
=:

3. Diff Type
=:

4. Cross-Provider
=:



NOTE: Select “No” for the Cross-Provider Subfilter when running a report for a single provider. Select “Yes” to run a report for multiple providers and if there are multiple provider domains configured in CAREWare.

4. Return to the Custom Report menu by clicking the name of the report in the breadcrumb link and click the **Run Report** Link.

The screenshot shows a web-based reporting interface for CAREWare. At the top, a breadcrumb navigation bar is visible with the following items: CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client Length of Care. The 'Client Length of Care' item is highlighted with a red box. Below the breadcrumb, there is a 'Back' link. The main title of the report is 'Client Length of Care' with a gear icon. To the left of the title is a 'Run Report' button, which is also highlighted with a red box. To the right of the title is a summary of report parameters: Start Date : 01/01/2019, End Date : 12/31/2019, Clients with services, Sum Numeric Totals, Display Specifications, Report Display as : Open in New Window, Most medical services in date span. Below this summary are three buttons: 'Report Layout' (Client Length of Care, Demographics), 'Field Selection' (Name, 1st Overall Service, Last Service, Date Diff), and 'Report Filter' (Report Filter is empty).

5. Click **Selected Providers** from the Action bar.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Run Report

Edit **Selected Providers** Run Report Back

Run Report

Parameters

Date From:

Date Through:

Clinical Review Year:

Output Display:

Show New Clients only:

Show Clients with Service only:

Show Specifications:

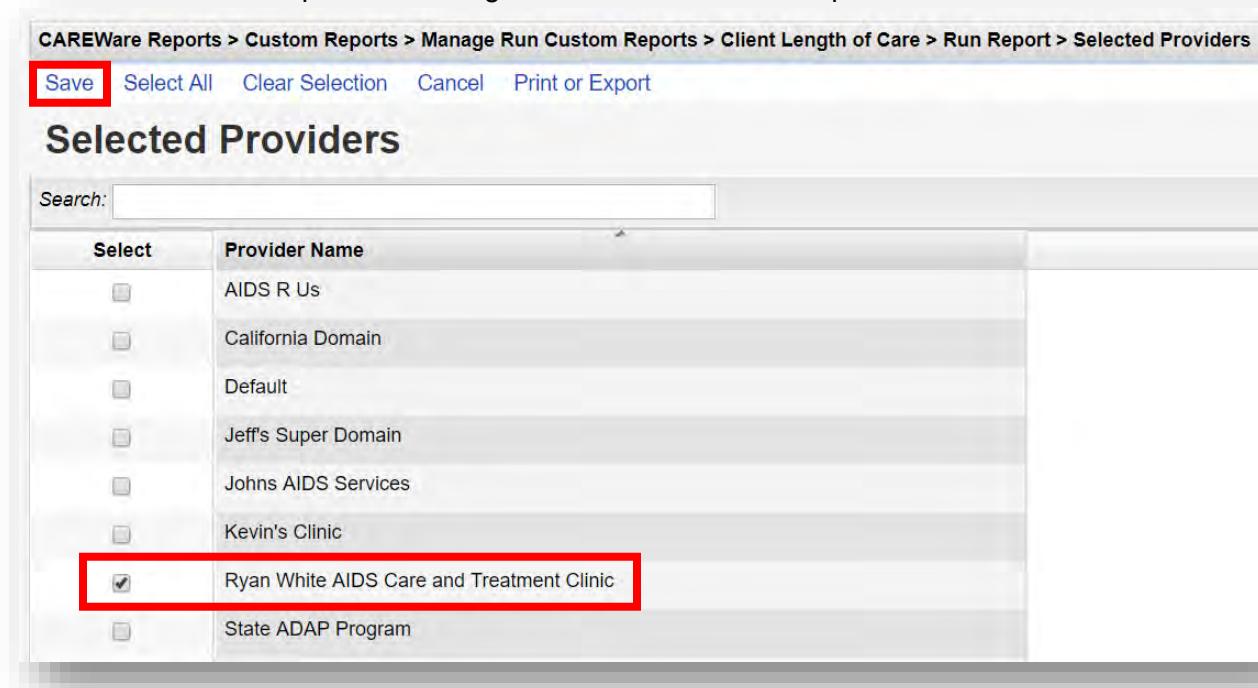
Sum Numeric Fields:

Primary Provider:

Group By Provider:

Selected Providers:

6. Select the desired providers using the checkbox. Once complete, click **Save**.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client Length of Care > Run Report > Selected Providers

Save Select All Clear Selection Cancel Print or Export

Selected Providers

Search:

Select	Provider Name
<input type="checkbox"/>	AIDS R Us
<input type="checkbox"/>	California Domain
<input type="checkbox"/>	Default
<input type="checkbox"/>	Jeff's Super Domain
<input type="checkbox"/>	Johns AIDS Services
<input type="checkbox"/>	Kevin's Clinic
<input checked="" type="checkbox"/>	Ryan White AIDS Care and Treatment Clinic
<input type="checkbox"/>	State ADAP Program

7. Run the “Client Length of Care” custom demographic report (see step 15 on page 11). An example of the results are found below.



Client Length of Care

Data Scope: Ryan White AIDS Care and Treatment Clinic

Report Start Date: 01/01/2019

Report End Date: 12/31/2019

Report Criteria: Report Filter is empty

Restrictions: Clients with services only

Name:	1st Overall Service:	Last Service:	Date Diff:
Adap, Sigourney	10/02/2012	04/10/2019	78
Appleseed, Johnny	01/30/2019	04/08/2019	3
Appleseed, Martha	04/01/2019	04/01/2019	0
Badland, Abbey	11/13/2018	02/11/2019	3
Baker, Clam	09/25/2012	03/01/2019	78
Brown, Buster	09/27/2018	01/24/2019	4

Now looking at the same report, we will select multiple providers (see step #6), and change the Cross-Provider Subfilter to "Yes" (see step #3). Below are the results.

Client Length of Care

Data Scope: Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic

Report Start Date: 01/01/2019

Report End Date: 12/31/2019

Report Criteria: Report Filter is empty

Restrictions: Clients with services only

Name:	1st Overall Service:	Last Service:	Date Diff:
Aaberg, Aaron Morin	01/01/2013	05/31/2019	76
Aaland, Abdul	11/01/2014	01/26/2019	50
Adap, Sigourney	10/02/2012	04/10/2019	78
Appleseed, Johnny	01/30/2019	04/08/2019	3
Appleseed, Martha	05/06/2014	04/01/2019	59
Badland, Abbey	11/01/2014	05/15/2019	54
Baker, Clam	09/25/2012	03/01/2019	78
Ball, Abigail	11/17/2014	05/31/2019	54
Ball, Wrecking	05/23/2019	05/23/2019	0
Brown, Buster	09/27/2018	01/24/2019	4

The number of months elapsed between the first and last service dates, with Cross-Provider Subfilter, set to "Yes", and multiple provider names selected, changes the report results.

Notice there are additional clients in the report and the number in the **Date Diff** column for client Martha Appleseed changed from 0 (in the previous single-provider report) to 59 months of care.

Other similar reports can be configured, such as the length of time between a client's First Service and First Medical Visit, or the length of time between a client's Enrollment Date and First Medical Visit or Lab result.

For further information, please see the Creating Custom Reports section of the jProg website:
<https://www.jprog.com/wiki/CAREWare%206.UG-Creating-Custom-Reports.ashx>

CAREWare 6



Section 9:

User and System Administration

Adapted from HRSA Quick Start User Guides:
<https://hab.hrsa.gov/program-grants-management/careware>

PLEASE NOTE: The client data used in these manuals is purely fictional.

First Things First

Getting Started

- You must have the appropriate user privileges to run reports.

Creating New Users

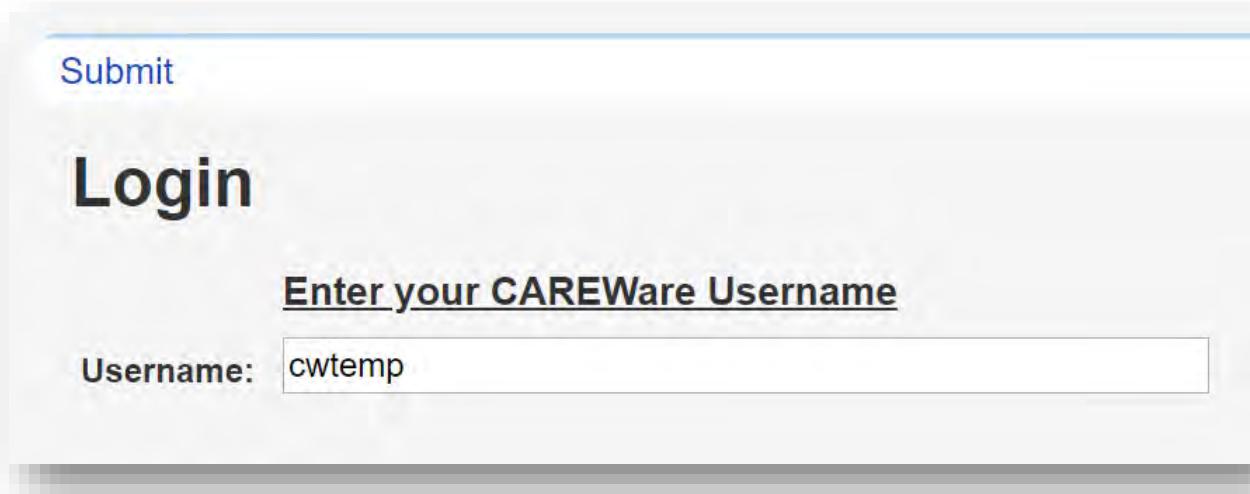
CAREWare comes with a single, default user, **cwtemp**, with the default password **TEMPCW100**. All passwords in CAREWare are **case-sensitive**, meaning that if you create a password like “Connie@01,” you can’t type “connie@01” when you log in.

User **cwtemp** comes with all system privileges, to allow setup of real users and assign their system privileges.

PLEASE NOTE: The Health Insurance Portability and Accountability Act (HIPAA) requires certain steps to protect the privacy and security of client protected health information (PHI).

One of these steps includes deactivating the **cwtemp** user after you’ve set up your real users; as this is a publicly available login ID that could be used for unauthorized access to your database if you haven’t changed it. If you choose to keep the **cwtemp** user active, change the password as soon as possible.

1. If you are setting up CAREWare for the first time, log in with the **cwtemp** login. Otherwise, log in with a user ID that already has full administrative privileges. You will see a screen that will give you the option to log in to **Central Administration** or either **Default or Your Provider (Domain) Name**, depending on how far your system has already been configured. Our sample database has already been configured, so its name appears here.



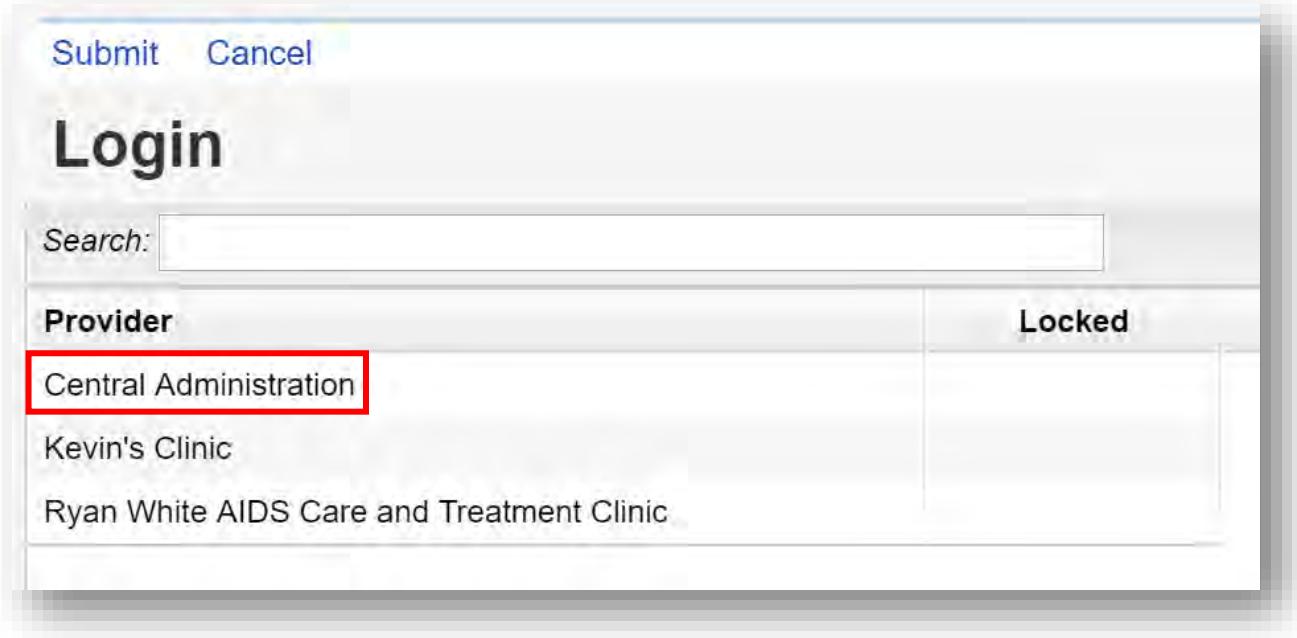
Submit

Login

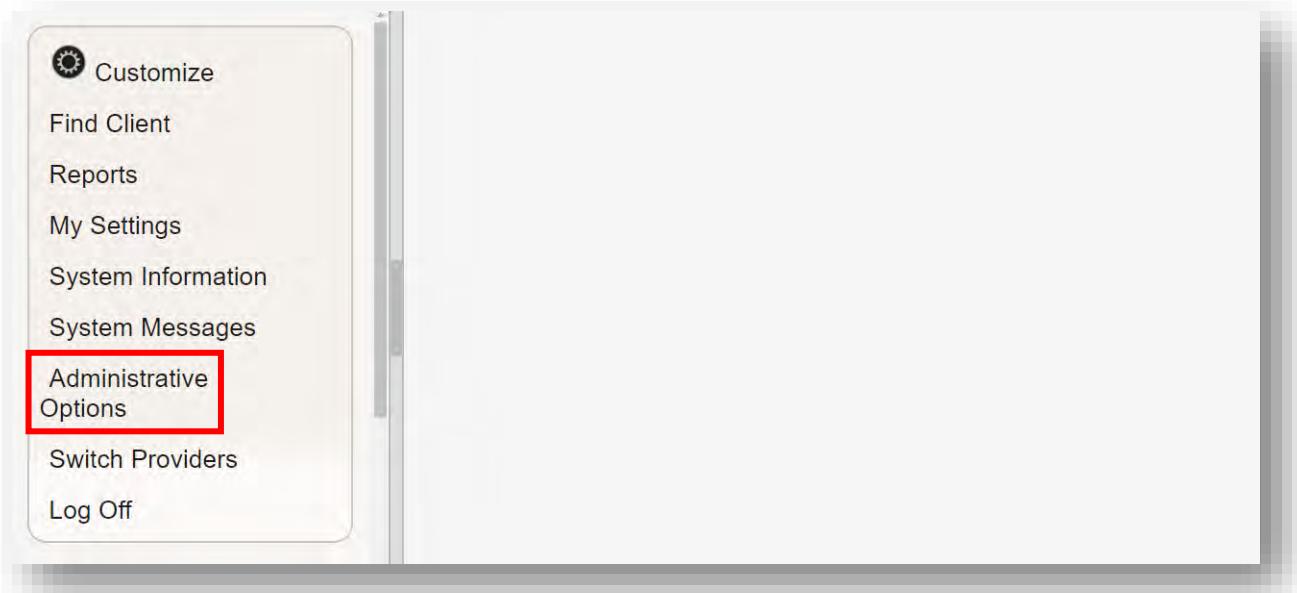
Enter your CAREWare Username

Username: cwtemp

2. From the **Login** menu, choose **Central Administration**. For security reasons, you only have 20 seconds to choose one or the other domains.



3. Select **Administrative Options** from the **Main Menu**.



4. Select **Provider User Manager** from the links menu.

Administrative Options

●Administrative Options

Provider User Manager Manage Provider and User Permissions

Custom Features Manage Custom Fields

Advanced Security Setup Manage Advanced Security Setup

Data Import and Export Features (PDI, PDE, HL7)

5. From the Provider User Manager menu, select **Manage Users** from the links menu.

Administrative Options > Provider User Manager

[Back](#)

●Provider User Manager

Manage Users Select a user and manage access to features. 236 total users

Manage User Groups Work with user permission groups that can be assigned to users. 20 total user groups

Manage Providers Select a provider and manage users and permissions. 7 total providers

6. You are now on the Manage Users menu. If you are configuring CAREWare for the first time, you'll only see the one user, **CWTEMP**. Select **New User** from the action bar.

Administrative Options > Provider User Manager > Manage Users

Manage **New User** Back Print or Export

Manage Users

Search: CWTEMP

Username	First Name	Last Name	Status	Realtime	Central User
CWTEMP	CW	TEMP	Active	6	X

7. Enter in the following information (as applicable) and click **Save**.

- **Username / Login ID**
- **First Name**
- **Last Name**
- **Phone**
- **Email**
- **Password (repeat)**
- **Title**
- **Force Password Reset on first login** (checkbox)

Administrative Options > Provider User Manager > Manage Users > New User

Save Back

New User

Username / Login ID:

First Name:

Last Name:

Phone:

Email:

Password:

Repeat Password:

Title:

Force Password Reset on first login:



TIP: You may want to standardize how new username formats are created. For example; the full Last name, and first initial of the First name or vice-versa.

The **Force Password Reset on first login** checkbox can be useful for network CAREWare administrators. A “default” password can be assigned to the user for the initial login. Users will then be required to change their password to continue.

The CAREWare password must be at least 8 characters, with two non-alpha characters - i.e., numbers or special characters. Passwords are case-sensitive. HIPAA compliance requires you to select a password that:

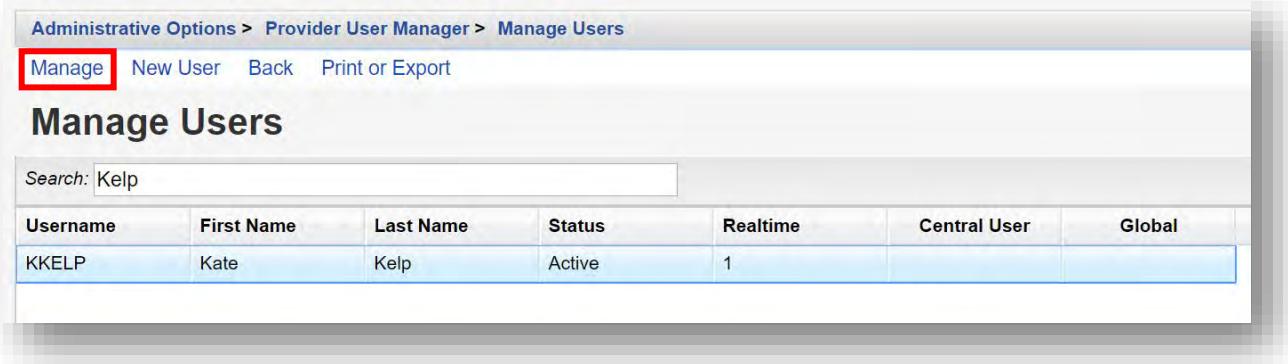
- Is not easy to guess (e.g. not using “password1234”)
- Has an alphanumeric combination (i.e., you might want to select a word and replace its vowels with numbers and symbols, i.e., “d1d@ct1c” for “didactic”)
- Is changed on a regular basis (every 90 days is typical in many corporate environments; check with your local IT department for company policy and standards if applicable)

Phone and email fields are optional. (* Note: if using the **Password Reset Manager**, a feature that allows users to unlock their own accounts; a valid email address is required in user information, to receive a password reset token via email.

It is generally recommended to complete all user contact information fields.

User/Provider Assignment

1. From the Manage Users Menu, select the desired user and click **Manage**.



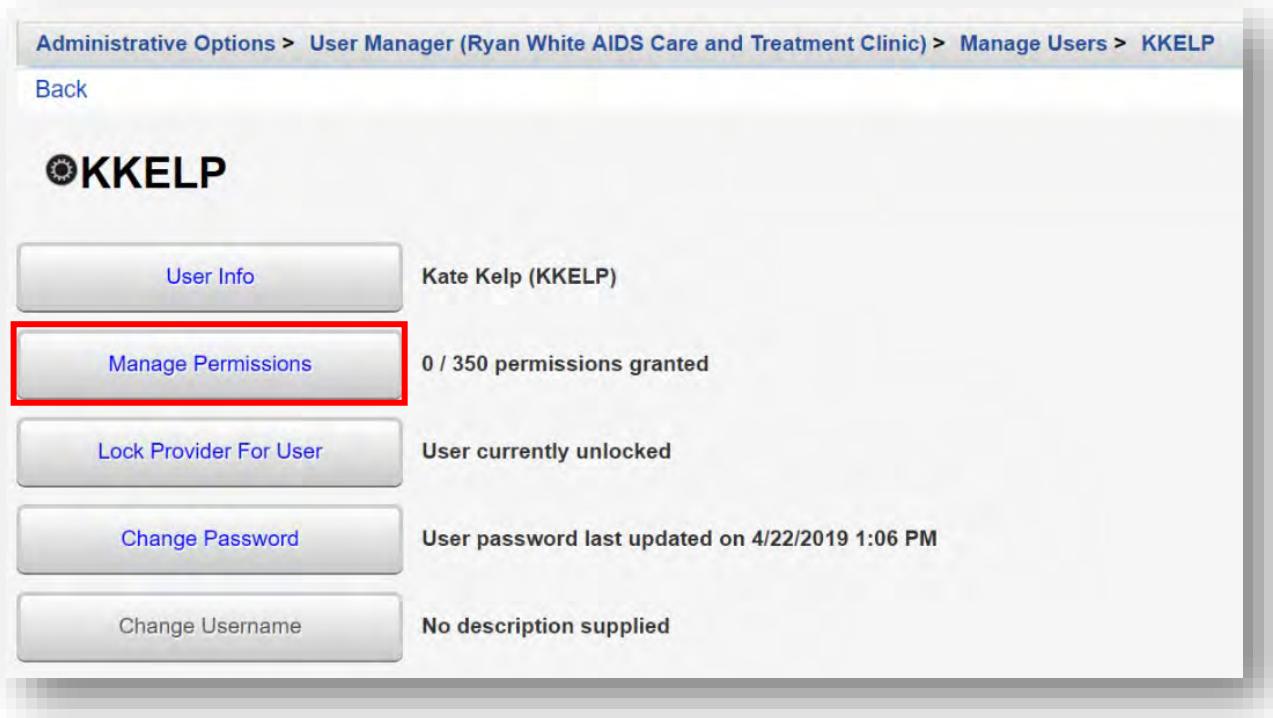
Administrative Options > Provider User Manager > Manage Users

Manage New User Back Print or Export

Manage Users

Manage Users						
Search: Kelp						
Username	First Name	Last Name	Status	Realtime	Central User	Global
KKELP	Kate	Kelp	Active	1		

2. Select **Manage Permissions** from the links menu.



Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Manage Users > KKELP
Back

KKELP

User Info	Kate Kelp (KKELP)
Manage Permissions	0 / 350 permissions granted
Lock Provider For User	User currently unlocked
Change Password	User password last updated on 4/22/2019 1:06 PM
Change Username	No description supplied

By default, new users have no permissions. They will be unable to complete any tasks, including adding, finding clients, or editing client information.

User permissions can be Granted Individually or Granted via Groups. Final Permission Status are the combination of both individual and group permissions granted.

3. From the Permissions for User menu, highlight the permission you would like to add for the user (in this example we are adding the permission “Add Client”) and select **Grant Individual Permission** from the action bar.



Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Manage Users > KKELP > Permissions for User: KKELP
Assign User Groups **Grant Individual Permission** Revoke Individual Permission Back Print or Export

Permissions for User: KKELP

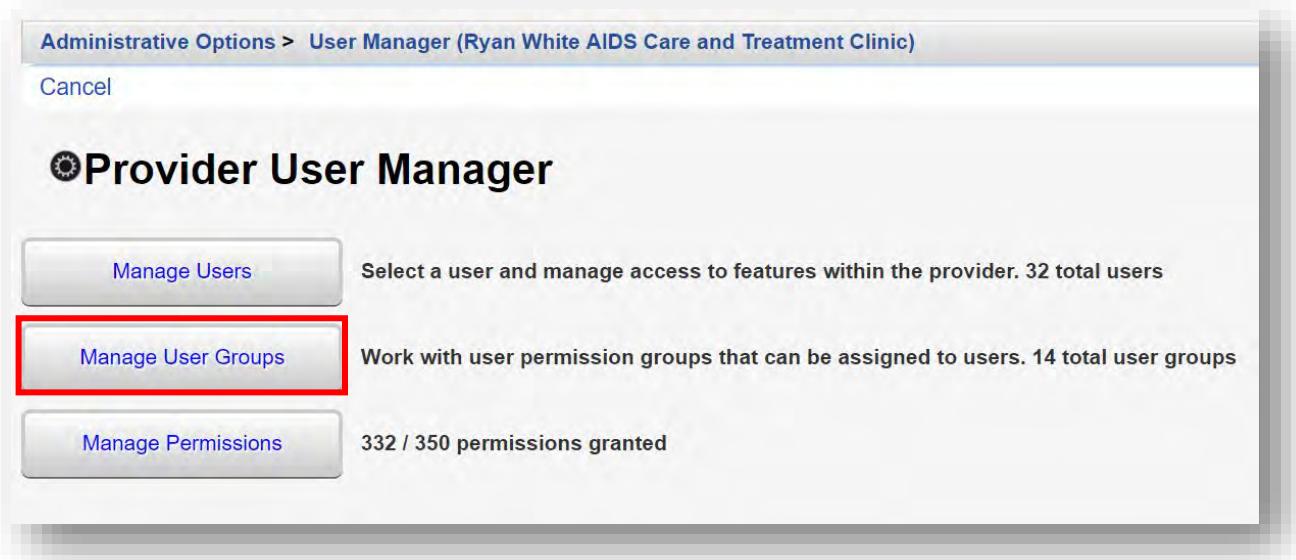
Permission	Final Permission Status	Granted via Groups	Granted Individual	Permission Category
0001	Add Client	No	No	Client
094f	Add/Delete ROIs	No	No	Client
aaad	Add/Edit Client Eligibility Records	No	No	Status/Eligibility

With over 350 other user permissions however, adding additional user permissions in this manner would be time-consuming and make it difficult to be consistent for a large number of users. To resolve this issue, we can utilize User Groups.

Creating User Groups

Groups can be created from either the Central Administration or Provider domain. We will create a new user group for a Provider domain.

1. From the Provider User Manager menu (return to pages 1-3 for directions on accessing this menu), select **Manage User Groups** from the links menu.



Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic)

Cancel

Provider User Manager

Manage Users Select a user and manage access to features within the provider. 32 total users

Manage User Groups Work with user permission groups that can be assigned to users. 14 total user groups

Manage Permissions 332 / 350 permissions granted

2. Select **New Group** from the action bar.



Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Manage User Groups

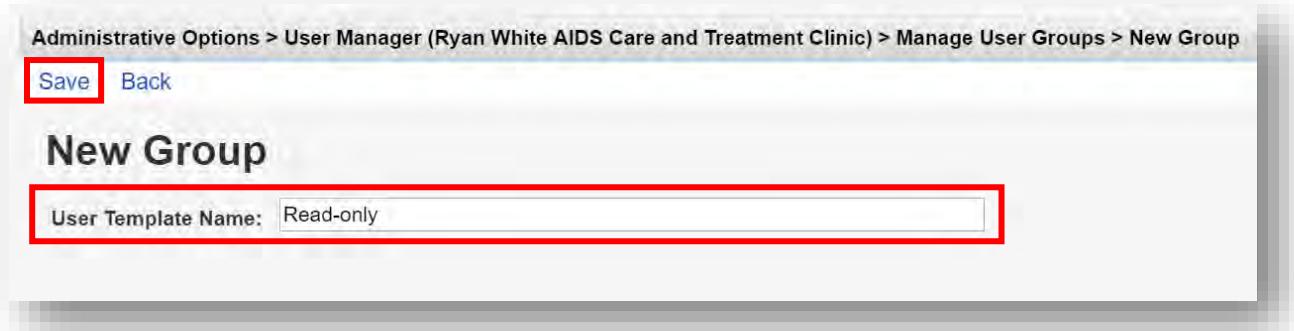
Manage **New Group** Delete Back Print or Export

Manage User Groups

Search:

User Group Name	Created By	Number Users Assigned
All Permissions	Central Administration	2
Some Permissions	Central Administration	6
SF_template	Central Administration	2
ADAP Template 1	Central Administration	2
39573957	Ryan White AIDS Care and Treatment Clinic	3

3. Enter a **User Template Name** and click **Save**. You will now be on the new group's link menu.



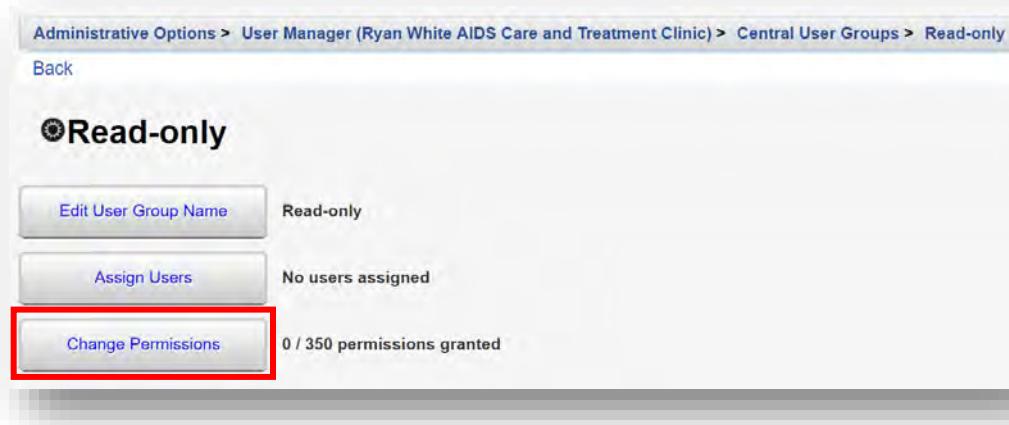
Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Manage User Groups > New Group

Save Back

New Group

User Template Name:

4. From the group's links menu (in this example, the group's name is Read-only), select **Change Permissions**.



Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Central User Groups > Read-only

Back

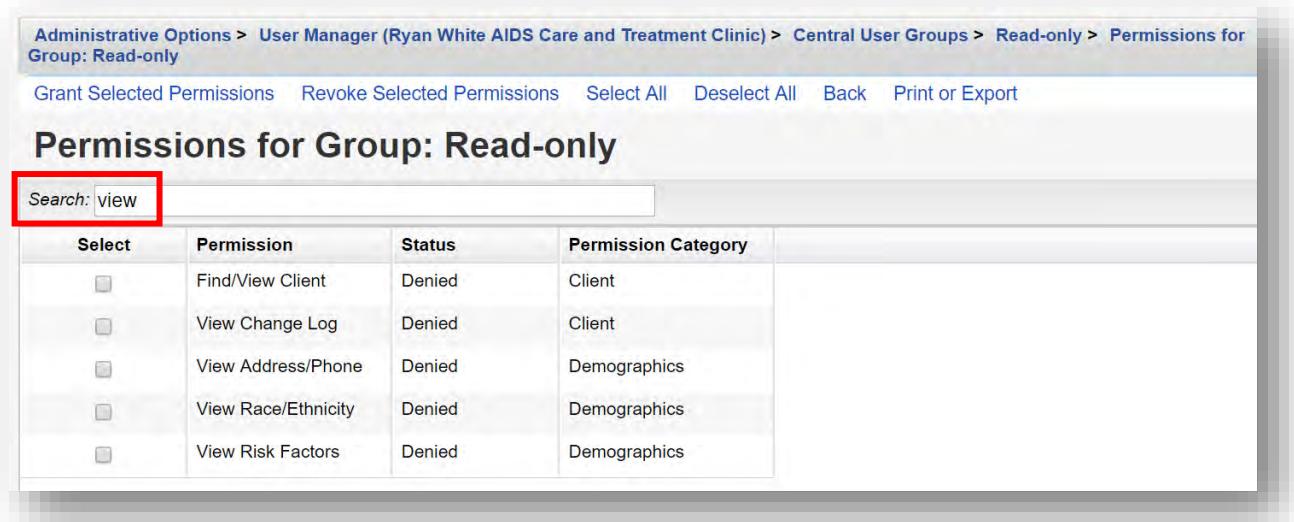
Read-only

Edit User Group Name Read-only

Assign Users No users assigned

Change Permissions 0 / 350 permissions granted

5. Enter "view" in the Search box. User permissions related to "view" are displayed.



Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Central User Groups > Read-only > Permissions for Group: Read-only

Grant Selected Permissions Revoke Selected Permissions Select All Deselect All Back Print or Export

Permissions for Group: Read-only

Search:

Select	Permission	Status	Permission Category
<input type="checkbox"/>	Find/View Client	Denied	Client
<input type="checkbox"/>	View Change Log	Denied	Client
<input type="checkbox"/>	View Address/Phone	Denied	Demographics
<input type="checkbox"/>	View Race/Ethnicity	Denied	Demographics
<input type="checkbox"/>	View Risk Factors	Denied	Demographics

6. Select desired permissions for the Read-only user group by using the check boxes in the Select column. Note: to narrow the search results, enter additional criteria in the Search field. Once all desired permissions are selected, click **Grant Selected Permissions**.

Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Central User Groups > Read-only > Permissions for Group: Read-only

Grant Selected Permissions Revoke Selected Permissions Select All Deselect All Back Print or Export

Permissions for Group: Read-only

Search: view

Select	Permission	Status	Permission Category
<input checked="" type="checkbox"/>	Find/View Client	Denied	Client
<input checked="" type="checkbox"/>	View Change Log	Denied	Client
<input checked="" type="checkbox"/>	View Address/Phone	Denied	Demographics
<input checked="" type="checkbox"/>	View Race/Ethnicity	Denied	Demographics
<input checked="" type="checkbox"/>	View Risk Factors	Denied	Demographics



NOTE: The **Select All** can be used from the action bar (see previous screenshot). However, using this method may grant unintended user permissions. It should be used with caution. By clicking at the top of the **Status** column, the Granted permissions will be sorted before the Denied permissions.

7. Note that the Status column for the previously selected permissions have changed to Granted. Click **Back** to return to the group's links menu.

Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Central User Groups > Read-only > Permissions for Group: Read-only

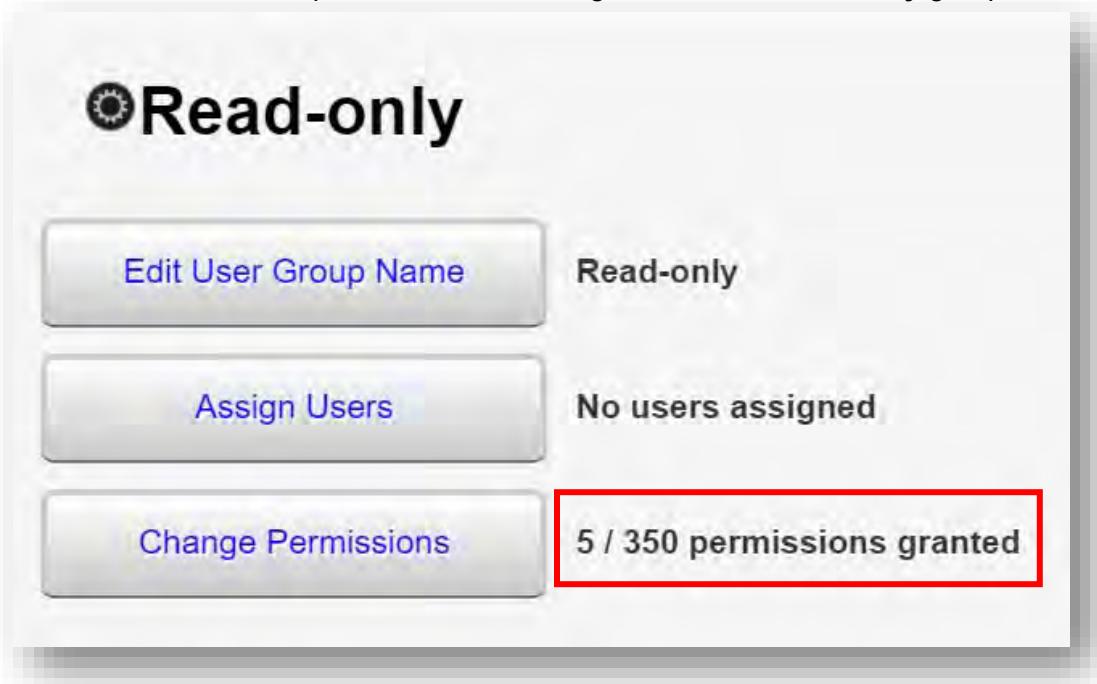
Grant Selected Permissions Revoke Selected Permissions Select All Deselect All **Back** Print or Export

Permissions for Group: Read-only

Search: view

Select	Permission	Status	Permission Category
<input type="checkbox"/>	Find/View Client	Granted	Client
<input type="checkbox"/>	View Change Log	Granted	Client
<input type="checkbox"/>	View Address/Phone	Granted	Demographics
<input type="checkbox"/>	View Race/Ethnicity	Granted	Demographics
<input type="checkbox"/>	View Risk Factors	Granted	Demographics

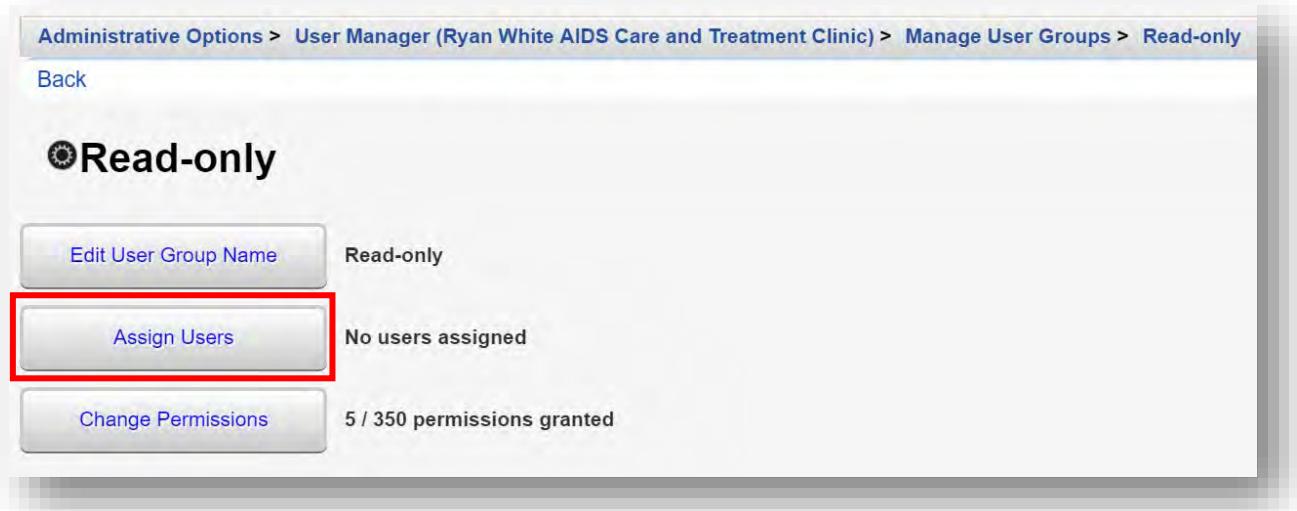
8. Note that 5 out of 350 permissions are now granted to the **Read-only** group.



The screenshot shows a user interface for managing a 'Read-only' user group. The page title is 'Read-only'. There are three main buttons: 'Edit User Group Name' (disabled), 'Read-only', 'Assign Users' (disabled), 'No users assigned', 'Change Permissions' (disabled), and '5 / 350 permissions granted'. The '5 / 350 permissions granted' text is highlighted with a red box.

Assigning Users to User Groups

1. From the user group's links menu, click **Assign Users**.



The screenshot shows the same 'Read-only' user group page. The 'Assign Users' button is now highlighted with a red box. The rest of the page content is identical to the previous screenshot.

2. Use the Search box field to search for the desired user (in this example, we are searching for user "kkelp"). Use the checkbox to select the user and click **Save**.

Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Manage User Groups > Read-only > Assign Users for Group: Read-only

[Save](#) [Back](#) [Print or Export](#)

Assign Users for Group: Read-only

Search: kkelp

Select	Username
<input checked="" type="checkbox"/>	KKELP

3. After clicking save, you will return to the user group's links menu. User "KKelp" has been assigned to the user group, Read-only, which has been granted five (5) permissions.

Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Manage User Groups > Read-only

[Back](#)

◎Read-only

[Edit User Group Name](#) **Read-only**

[Assign Users](#) **KKELP**

[Change Permissions](#) **5 / 350 permissions granted**

Other User Management Options

It is recommended to manage user accounts from the Central Administration domain to access the full menu of user options.

1. From the Provider User Manager menu (return to pages 1-3 for directions on accessing this menu), select **Manage Users** from the links menu.



Administrative Options > Provider User Manager

Back

Provider User Manager

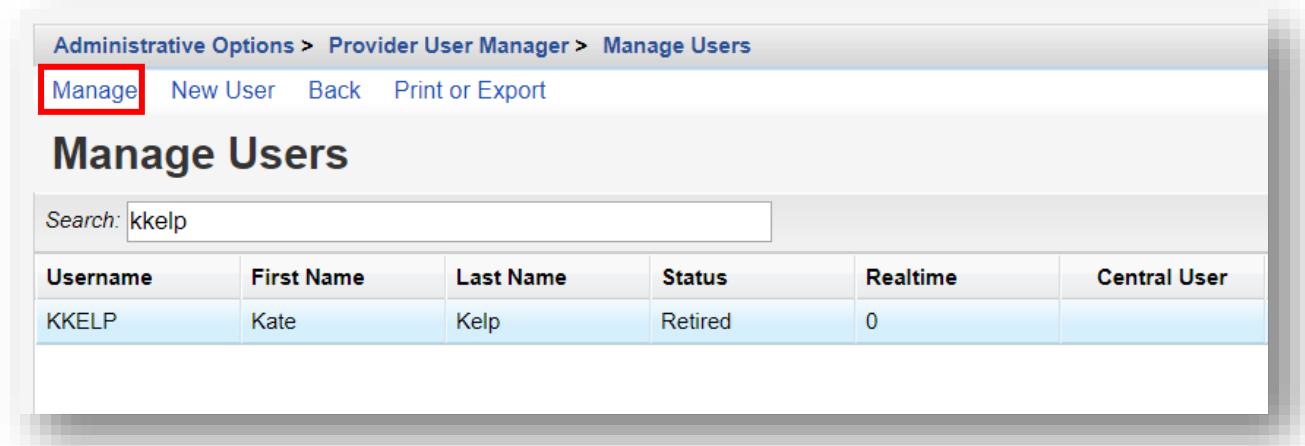
Manage Users Select a user and manage access to features. 237 total users

Manage User Groups Work with user permission groups that can be assigned to users. 21 total user groups

Manage Providers Select a provider and manage users and permissions. 7 total providers

User Notices Manage user notices

2. From the Manage Users Menu, select the desired user and click **Manage**.



Administrative Options > Provider User Manager > Manage Users

Manage New User Back Print or Export

Manage Users

Search: kkelp

Username	First Name	Last Name	Status	Realtime	Central User
KKELP	Kate	Kelp	Retired	0	

3. You are now on the user's menu:

Administrative Options > Provider User Manager > Manage Users > KKELP

Back

KKELP

User Info	Kate Kelp (KKELP)
Assign Providers	Ryan White AIDS Care and Treatment Clinic
Assign Provider Groups	Read-only
Change Password	User password last updated on 4/22/2019 1:06 PM
Change Username	Change this user's Username
Reset Security Challenges	Reset will force the user to setup Security Challenges upon next login
Undo Password Lockout	Not Locked Out
Reset Internal 2 Factor Key	Server is not set up for 2 factor auth
User Notices	View acknowledged user notices

4. Select a desired link menu to complete/edit the following:

- **User Info**
- **Assign Providers**
- **Assign Provider Groups**
- **Change Password**
- **Change Username**
- **Reset Security Challenges**
- **Undo Password Lockout**
- **Reset Internal 2 Factor Key**
- **User Notices**
- **Undo Password Lockout** – When users enter their password incorrectly more than three times, you must Undo Password Lockout. By default, the user account will be automatically locked out of CAREWare, until unlocked.

There are several other (optional) user account security settings available in CAREWare, including:

- **Reset Security Challenges** – For users who have been locked out and unlocked, resetting the security challenge questions will require them to create new challenge questions when they log in again.
- **Email Password Reset** – Enabling this feature will allow users who are locked out to reset their own password using a token sent to the email address in their user settings.

A user account cannot be Deleted, only the username can be changed. Users can be assigned and reassigned to multiple providers.

If a user is not assigned to any provider, the user account will automatically change to **User retired**. (Note: when a user account is “retired”, all previously assigned individual and group permissions will automatically be revoked.)

The screenshot shows a user management interface. At the top, a breadcrumb navigation path is visible: Administrative Options > Provider User Manager > Manage Users > KKELP. Below this, a 'Back' link is present. The main area features a large, stylized 'OKKELP' logo. Underneath the logo, there are three buttons: 'User Info' (which displays the name 'Kate Kelp (KKELP)'), 'Assign Providers' (which has a red box around the text 'User retired'), and 'Assign Provider Groups' (which displays the message 'No provider user groups assigned').

Restriction of PII in Reports

This feature allows administrators to restrict users' access to Personal Identifying Information (PII) that is available in most CAREWare built-in reports on a field-by-field basis. With sufficient permissions, a user may select the **Hide Personally Identifying Information** box to conceal certain field selections in prebuilt reports.

When reports are run, PII fields will be replaced with asterisks in the restricted fields:

The screenshot shows a table with five columns: 'Name:', 'URN:', 'eURN:', 'Last Service Date:', and 'Provider:'. The first two columns are highlighted with a red box. The 'Name:' column contains three rows with asterisks (*). The 'URN:' column also contains three rows with asterisks (*). The 'eURN:' column contains '+fAOgPpbm'. The 'Last Service Date:' column contains '1/12/2009 12:00:00 AM'. The 'Provider:' column contains 'Ryan White AIDS ...'.

Name:	URN:	eURN:	Last Service Date:	Provider:
*	*	+fAOgPpbm		
*	*	+fjZ4UmQF	1/12/2009 12:00:00 AM	Ryan White AIDS ...
*	*	+jFNVVlsw		

Report restrictions can also be managed via permission groups configured within the **User Group Admin (Reports)** menu in the **Central Administration** domain.

1. From Administrative Options on the **Main Menu**, select the **Advanced Security Setup** link.

The screenshot shows the CAREWare software interface. On the left, a vertical menu bar lists various options: Customize, Add Client, Find Client, Reports, Rapid Entry, My Settings, System Information, System Messages, Administrative Options, Switch Providers, and Log Off. Below this menu is a notification box containing the text: "This is a test notification" and "Keep your eye on the CAREWare listserv as we will soon send out a notice to register for a series of user trainings!". The main content area is titled "Administrative Options" and contains a list of management tasks. Each task is represented by a button with a sub-label to its right. The tasks are: Provider User Manager (Manage Provider and User Permissions), Clinical Setup (Manage Available Clinical Definitions for Providers), Provider Management (Manage Provider Setup and Provider By Provider Sharing), Grantee Setup (Manage Grantee Settings), Active Grantee Funding Sources (Currently Active Sources: Part A, Part B), Service/Contract Setup (Manage Contracts And Available Service Types), Custom Features (Manage Custom Fields), Advanced Security Setup (Manage Advanced Security Setup), and Data Import and Export Features (PDI, PDE, HL7). The "Advanced Security Setup" button is highlighted with a red rectangular box.

Administrative Options	
Provider User Manager	Manage Provider and User Permissions
Clinical Setup	Manage Available Clinical Definitions for Providers
Provider Management	Manage Provider Setup and Provider By Provider Sharing
Grantee Setup	Manage Grantee Settings
Active Grantee Funding Sources	Currently Active Sources: Part A, Part B
Service/Contract Setup	Manage Contracts And Available Service Types
Custom Features	Manage Custom Fields
Advanced Security Setup	Manage Advanced Security Setup
Data Import and Export Features	(PDI, PDE, HL7)

2. Select the **User Group Admin (Reports)** link.



Administrative Options > Advanced Security Options

Back

Advanced Security Options

Security Question Setup	Manage Security Questions
Security Challenge Settings	Manage Security Challenge Settings
User Group Admin (Reports)	Manage report field restrictions for users
Email Password Reset Settings	Enabling this feature will allow users who are locked out to reset their own password using a token sent to the email address in their user settings
Turn 2 factor authentication On or Off	Turn 2 factor authentication On or Off for CAREWare server. Status: (OFF)
Advanced Encryption Options	Update the database encryption keys
Configure OAuth2	Off: Users will login using a CAREWare username and password

3. Select the PII Restricted Group from the User Group column. Note the number five (5) under the Restrictions column. Click **Manage** from the action bar.



Administrative Options > Advanced Security Options > User Group Admin (Reports)

Manage Add Delete Back Print or Export

User Group Admin (Reports)

User Group	Restrictions
Default User Group	0
PII Restricted Group	5

4. On the Manage menu, select **Edit Group Restrictions**.



Administrative Options > Advanced Security Options > User Group Admin (Reports) > Manage

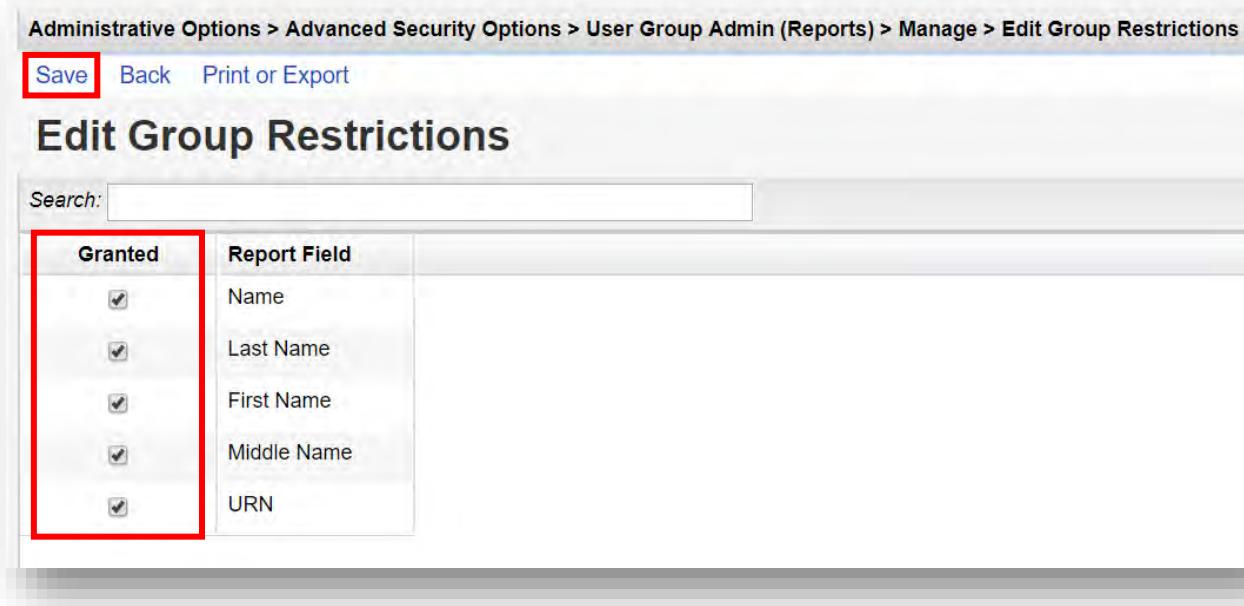
Back

Manage

[View](#) Manage Single User Restriction group

[Edit Group Restrictions](#) Manage Single User Restrictions

5. By default, five (5) PII Restricted fields are preselected: Name, Last Name, First Name, Middle Name, and URN. These are the fields that will be hidden when the **Hide Personally Identifying Information** box is selected for prebuilt reports. To edit restrictions, check/uncheck the boxes in the Granted column and click **Save**.



Administrative Options > Advanced Security Options > User Group Admin (Reports) > Manage > Edit Group Restrictions

[Save](#) Back Print or Export

Edit Group Restrictions

Search:

Granted	Report Field
<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Last Name
<input checked="" type="checkbox"/>	First Name
<input checked="" type="checkbox"/>	Middle Name
<input checked="" type="checkbox"/>	URN

6. On the User Group Admin (Reports) menu (see steps 1-3), new User Group(s) with customized restricted fields can also be created. To do so, click **Add** from the action bar.

Administrative Options > Advanced Security Options > User Group Admin (Reports)

Manage **Add** Delete Back Print or Export

User Group Admin (Reports)

Search:

User Group	Restrictions
Default User Group	0
PII Restricted Group	5

7. Enter in the **Group Name** and click **Save**.

Administrative Options > Advanced Security Options > User Group Admin (Reports) > Add

Save Back

Add

Group Name:

8. To apply the restrictions, go to the Manage Users menu (see pages 1-3) and select the desired user. Click **Manage**.

Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Manage Users

Manage New User Back Print or Export

Manage Users

Search: kkelp

Username	First Name	Last Name	Status	Groups	Locked
KKELP	Kate	Kelp	Active	0	

9. Select Manage Report Field Restrictions.



Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Manage Users > KKELP

Back

KKELP

User Info: Kate Kelp (KKELP)

Manage Permissions: 0 / 350 permissions granted

Change Password: User password last updated on 4/22/2019 1:06 PM

Manage Report Field Restrictions: Custom report field restrictions in effect: 0. Custom report restriction groups in effect: 0

10. From the Report Field Restrictions for User menu, select **Manage Restrictions**.



Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Manage Users > KKELP > Report Field Restrictions for User: KKELP

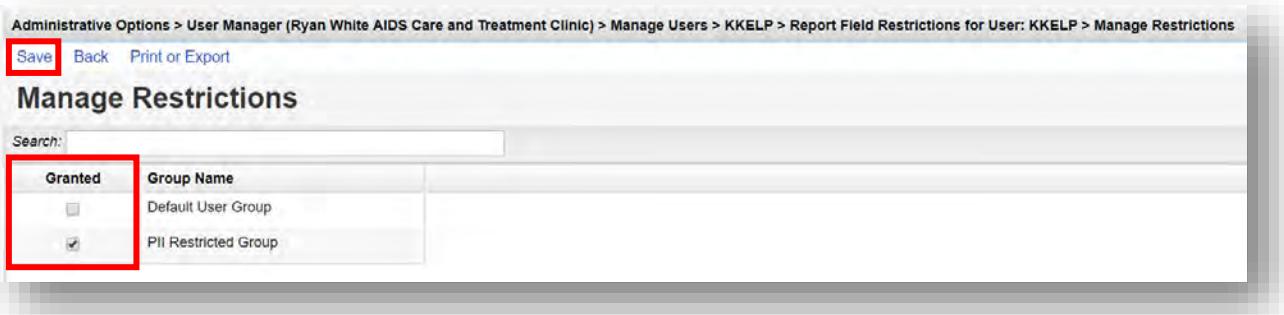
Manage Restrictions Back Print or Export

Report Field Restrictions for User: KKELP

Search:

Report Field Restrictions

11. Select the desired Group name by placing a check in the Granted column. Click **Save**.



Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Manage Users > KKELP > Report Field Restrictions for User: KKELP > Manage Restrictions

Save Back Print or Export

Manage Restrictions

Search:

Granted	Group Name
<input type="checkbox"/>	Default User Group
<input checked="" type="checkbox"/>	PII Restricted Group

12. The Report Field Restrictions are now displayed for the selected user.

Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Manage Users > KKELP > Report Field Restrictions for User: KKELP

Manage Restrictions Back Print or Export

Report Field Restrictions for User: KKELP

Search:

Report Field Restrictions
First Name
Last Name
Middle Name
Name
URN

Configuring Provider Permissions

Once you've set up your Central Administration user, it's time to set up your provider permissions. These will restrict the permissions available to users within the provider domain. For instance, as the central administrator, you may want to control whether or not providers can make changes to contracts.

By restricting certain providers' permissions, you make it impossible for any user at that provider to change those configurations. These permissions have to be administered at the Central Administration level.

1. Log in to the **Central Administration** domain.

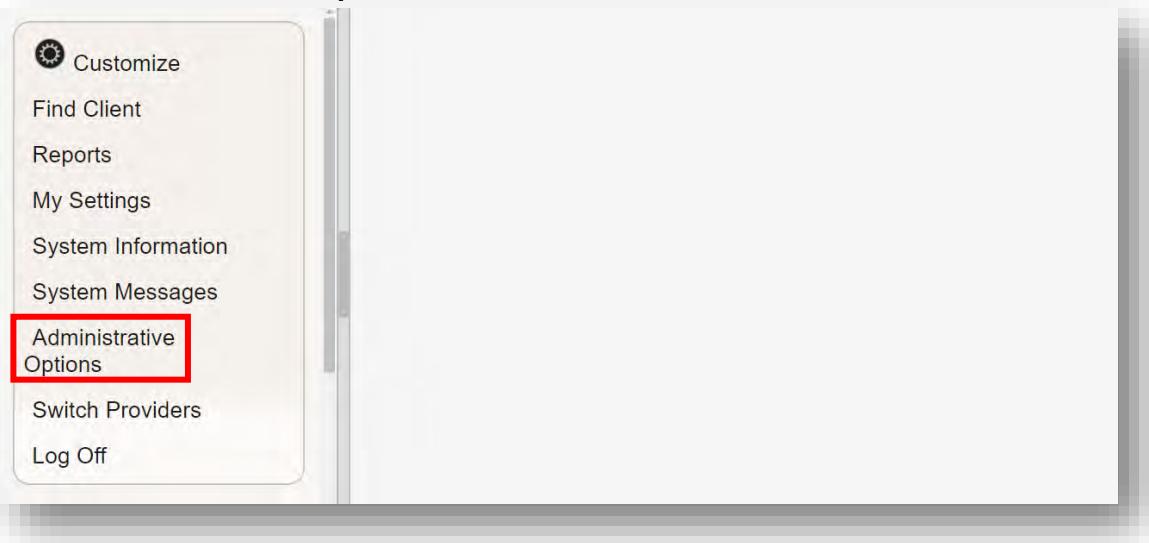
Submit Cancel

Login

Search:

Provider	Locked
Central Administration	Locked
Kevin's Clinic	Unlocked
Ryan White AIDS Care and Treatment Clinic	Unlocked

2. Select **Administrative Options** from the **Main Menu**.



3. Select **Provider User Manager** from the links menu.



4. From the Provider User Manager menu, select **Manage Providers** from the links menu.

Administrative Options > Provider User Manager

Back

Provider User Manager

[Manage Users](#) Select a user and manage access to features. 236 total users

[Manage User Groups](#) Work with user permission groups that can be assigned to users. 20 total user groups

[Manage Providers](#) Select a provider and manage users and permissions. 7 total providers



5. Select the relevant provider and click **Manage** from the action bar.

Administrative Options > Provider User Manager > Manage Providers

[Manage](#) [Add Provider](#) [Delete](#) [Back](#) [Print or Export](#)

Manage Providers

Search: Ryan White

Provider	Users	Groups	Active
Ryan White AIDS Care and Treatment Clinic	32	14	X



6. Select **Manage Permissions** from the link menu.

Administrative Options > Provider User Manager > Manage Providers > Ryan White AIDS Care and Treatment Clinic

Back

Ryan White AIDS Care and Treatment Clinic

[Manage Users](#) Select a user and manage access to features within the provider. 32 total users

[Manage User Groups](#) Work with user permission groups that can be assigned to users. 14 total user groups

[Manage Permissions](#) 332 / 350 permissions granted

[Deactivate Provider](#) Provider currently active

[Change Cross-Provider Report Fields](#) 214 / 281 permissions granted

7. In this example, we will revoke some ADAP drug permissions as this agency does not provide any ADAP services. Enter “ADAP drug” in the Search box. Select one of the ADAP permissions and select **Revoke Individual Permission** from the action bar. Continue until the remaining ADAP drug permissions are revoked.

Administrative Options > Provider User Manager > Manage Providers > Ryan White AIDS Care and Treatment Clinic > Permissions for Provider: Ryan White AIDS Care and Treatment Clinic

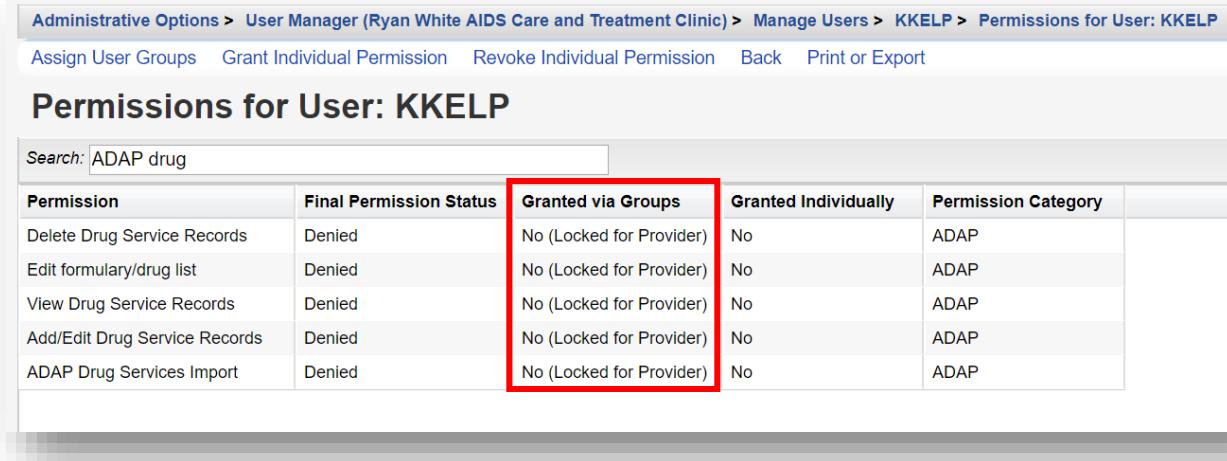
Assign Provider Groups Grant Individual Permission [Revoke Individual Permission](#) Back Print or Export

Permissions for Provider: Ryan White AIDS Care and Treatment Clinic

Search: ADAP drug

Final Permission Status	Permission	Granted Individually	Granted via Group	Permission Category
Granted	Delete Drug Service Records	Yes	No	ADAP
Granted	Edit formulary/drug list	Yes	No	ADAP
Granted	View Drug Service Records	Yes	No	ADAP
Granted	Add/Edit Drug Service Records	Yes	No	ADAP
Granted	ADAP Drug Services Import	Yes	No	ADAP

8. Now, once we switch providers and log into the Ryan White AIDS Care and Treatment Clinic provider domain, the “ADAP drug” permissions are listed as “No (Locked for Provider)” under the **Granted via Groups** column.



Administrative Options > User Manager (Ryan White AIDS Care and Treatment Clinic) > Manage Users > KKELP > Permissions for User: KKELP

Assign User Groups Grant Individual Permission Revoke Individual Permission Back Print or Export

Permissions for User: KKELP

Permission	Final Permission Status	Granted via Groups	Granted Individually	Permission Category
Delete Drug Service Records	Denied	No (Locked for Provider)	No	ADAP
Edit formulary/drug list	Denied	No (Locked for Provider)	No	ADAP
View Drug Service Records	Denied	No (Locked for Provider)	No	ADAP
Add/Edit Drug Service Records	Denied	No (Locked for Provider)	No	ADAP
ADAP Drug Services Import	Denied	No (Locked for Provider)	No	ADAP

Now, regardless of group permissions applied, no user at this agency can access the locked section unless you unlock the **Permissions for Provider** or change **Provider Permissions Group** from the Central Administration domain.

Other Provider Management Options

Deleting Providers

WARNING: Deleting a Provider will PERMANENTLY remove the provider, including all records (tests, services, referrals, etc.) associated with this provider. Additionally, any clients that are ONLY associated with this provider will also be deleted. Once these records are deleted, there is NO WAY TO RESTORE the data.

Instead, it is recommended to **Deactivate** a Provider, which will retain provider settings and save client data, should the provider be reactivated in the future. Please refer to the next section for further instructions.

To delete a provider:

1. From the Manage Providers menu, highlight the desired provider by clicking on the provider’s name, and click **Delete** from the action bar.



Administrative Options > Provider User Manager > Manage Providers

Manage Add Provider **Delete** Back Print or Export

Manage Providers

Provider	Users	Groups	Active
Ryan White AIDS Care and Treatment Clinic	32	14	X

2. A Delete Confirm box will appear. To confirm, you must type in the word “DELETE” into the text box and click **Confirm**.



Deactivating Providers

1. From the Manage Providers menu, highlight the desired provider by clicking on the provider's name, and click **Manage** from the action bar.

A screenshot of the 'Manage Providers' screen. The top navigation bar shows 'Administrative Options > Provider User Manager > Manage Providers'. Below it is a toolbar with buttons for 'Manage' (which is highlighted with a red box), 'Add Provider', 'Delete', 'Back', and 'Print or Export'. The main area is titled 'Manage Providers' and contains a search bar with 'Search: Ryan White'. A table lists providers with columns: 'Provider', 'Users', 'Groups', and 'Active'. One row is shown for 'Ryan White AIDS Care and Treatment Clinic' with 32 users, 14 groups, and the 'Active' checkbox checked (indicated by an 'X').

2. Select the **Deactivate Provider** link.

Administrative Options > Provider User Manager > Manage Providers > Ryan White AIDS Care and Treatment Clinic

Back

Ryan White AIDS Care and Treatment Clinic

Manage Users	Select a user and manage access to features within the provider. 32 total users
Manage User Groups	Work with user permission groups that can be assigned to users. 14 total user groups
Manage Permissions	332 / 350 permissions granted
Deactivate Provider	Provider currently active
Change Cross-Provider Report Fields	214 / 281 permissions granted

3. The link will change to **Reactive Provider**. To reactivate the provider, select the **Reactivate Provider** link.

Administrative Options > Provider User Manager > Manage Providers > Ryan White AIDS Care and Treatment Clinic

Back

Ryan White AIDS Care and Treatment Clinic

Manage Users	Select a user and manage access to features within the provider. 32 total users
Manage User Groups	Work with user permission groups that can be assigned to users. 14 total user groups
Manage Permissions	332 / 350 permissions granted
Reactive Provider	Provider currently inactive
Change Cross-Provider Report Fields	214 / 281 permissions granted

Using the Provider Setup

Provider Setup is used to edit an agency's name, information, contact information, or add a provider logo. This is also where you would rename the "Default" provider to your agency's name, in a new installation of CAREWare.

From Central Administration, you can set up all providers.

1. Log in to the **Central Administration** domain.

The screenshot shows a 'Login' screen with 'Submit' and 'Cancel' buttons. Below it is a table titled 'Provider' with a 'Locked' column. The table contains three rows: 'Central Administration' (which is highlighted with a red box), 'Kevin's Clinic', and 'Ryan White AIDS Care and Treatment Clinic'.

Provider	Locked
Central Administration	
Kevin's Clinic	
Ryan White AIDS Care and Treatment Clinic	

2. Select **Administrative Options** from the **Main Menu**.

The screenshot shows the CAREWare main menu with various options: 'Customize', 'Find Client', 'Reports', 'My Settings', 'System Information', 'System Messages', 'Administrative Options' (which is highlighted with a red box), 'Switch Providers', and 'Log Off'.

3. Select **Provider Management** from the links menu.

Administrative Options

●Administrative Options

Provider User Manager	Manage Provider and User Permissions
Clinical Setup	Manage Available Clinical Definitions for Providers
Provider Management	Manage Provider Setup and Provider By Provider Sharing
Grantee Setup	Manage Grantee Settings
Active Grantee Funding Sources	Currently Active Sources: Part A, Part B

4. Select **Provider Setup**.

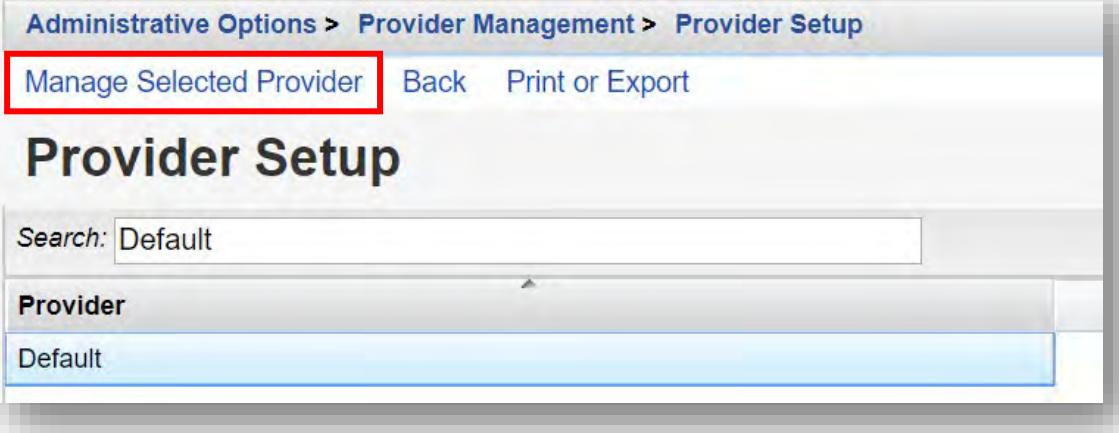
Administrative Options > Provider Management

Back

●Provider Management

Provider Setup	Select a provider and manage provider setup information
Provider By Provider Sharing	Globally manage sharing on a provider-by-provider basis
Sharing Attachment Requirement	On: A document attachment is required for a provider-by-provider sharing setting to take effect

5. Select “Default” provider, then click **Manage Selected Provider** from the action bar.



Administrative Options > Provider Management > Provider Setup

Manage Selected Provider Back Print or Export

Provider Setup

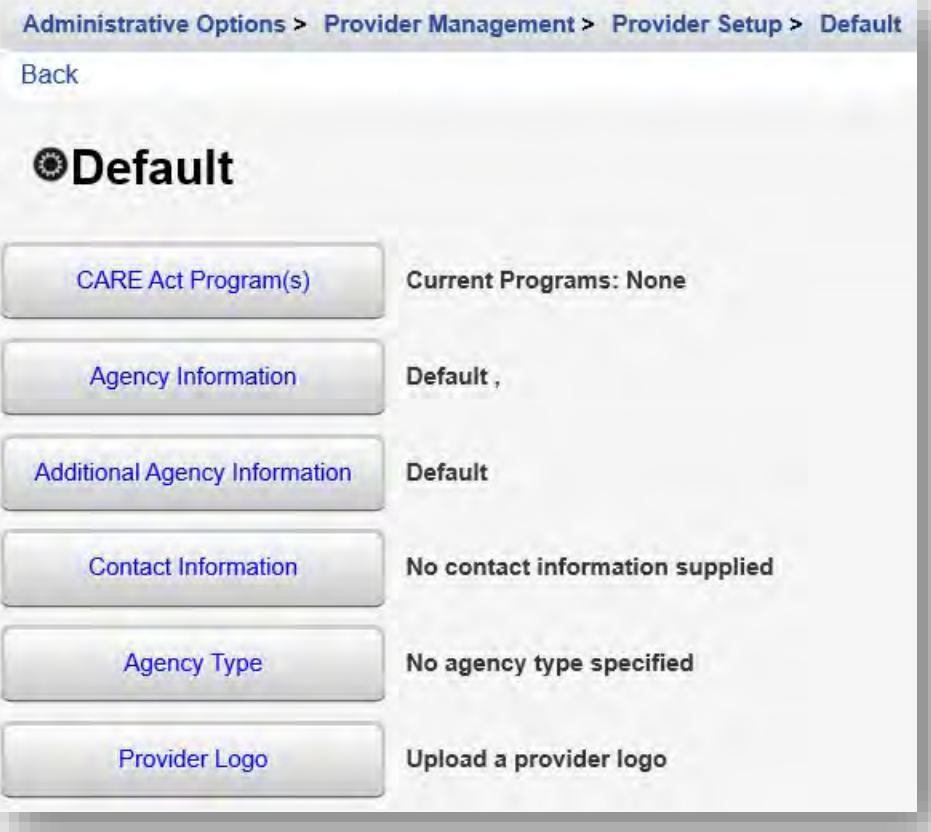
Search: Default

Provider
Default

Using the Provider Setup, CAREWare administrators can set up sharing for services, clinical data, case notes, appointments, custom subforms, and the form designer.

As a stand-alone provider, this is not applicable and will not be covered here. (For further information regarding multiple provider and network data sharing options, please refer to the CAREWare developer website: <https://www.jprog.com/>)

6. Once you click **Manage Selected Provider**, you will be at the provider's Provider Setup menu.



Administrative Options > Provider Management > Provider Setup > Default

Back

Default

CARE Act Program(s)	Current Programs: None
Agency Information	Default ,
Additional Agency Information	Default
Contact Information	No contact information supplied
Agency Type	No agency type specified
Provider Logo	Upload a provider logo

7. Select **CARE Act Program(s)**. Click **Edit**. Check the Ryan White funding sources your agency receives. Click **Save**.

Administrative Options > Provider Management > Provider Setup > Default > CARE Act Program(s) > Edit

Save **Cancel**

CARE Act Program(s)

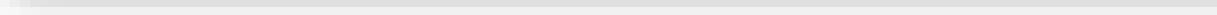
Part A:

Part B:

Part C:

Part D:

HIP:



8. Select **Agency Information**. Enter your provider information (this is the information that will replace the “Default” provider), in a new installation of CAREWare. Click **Save**.

Administrative Options > Provider Management > Provider Setup > Default > Agency Information > Edit

Save **Cancel**

Agency Information

Name: ×

Street Address:

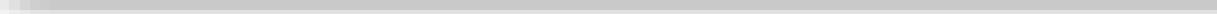
City:

State:

County:

Area:

Zip:



9. Select **Additional Agency Information**. Enter your provider information. It is recommended to use the ID's applicable on the RSR report for easy cross reference. Click **Save**.

Administrative Options > Provider Management > Provider Setup > Default > Additional Agency Information > Edit

Save **Cancel**

Additional Agency Information

Part A ID:	<input type="text"/>
Part B ID:	<input type="text"/>
Taxpayer ID:	<input type="text"/>
Part A Grantee ID:	<input type="text"/>
Part B Grantee ID:	<input type="text"/>
Part C Grantee ID:	<input type="text"/>
Part D Grantee ID:	<input type="text"/>
Receives 330 Funding:	<input type="text"/> 
Receives MAI Funding:	<input type="text"/> 
Agency Type:	Service Provider 
Reporting Scope:	<input type="text"/> 
Provider Type:	<input type="text"/> 
Other Provider Type:	<input type="text"/>
Ownership Status:	<input type="text"/> 



TIP: The agency DUNS number can be entered in the **Other Provider Type** field.

10. Select Contact Information. Enter the primary contact information for your agency. Click **Save**.

Administrative Options > Provider Management > Provider Setup > Default > Contact Information > Edit

Save **Cancel**

Contact Information

Contact Name:

Title:

Phone:

Fax:

Email:

11. Select Agency Type. Enter all that apply for your agency. Click **Save**.

Administrative Options > Provider Management > Provider Setup > Default > Agency Type > Edit

Save **Cancel**

Agency Type

An agency in which racial/ethnic minority group members make up greater than 50% of the agency's board members.:

Racial/ethnic minority group members make up greater than 50% of the agency's professional staff members in HIV direct services.:

Solo or group private health care practice in which greater than 50% of the clinicians are racial/ethnic minority group members.:

Other "traditional" provider that has historically served racial/ethnic minority patients/clients but does not meet the criteria above.:

Other type of agency or facility:

Total Paid HIV Staff in FTE's:

Total Volunteer HIV Staff in FTE's:

12. Select **Provider Logo**, to add or change your agency logo. Select **Browse** to upload any .BMP, .GIF, .JPG, or JPEG file format. This file will then be displayed on your agency's title page in CAREWare.

Administrative Options > Provider Management > Provider Setup > Default > Provider Logo

Save Delete Current Back

Provider Logo

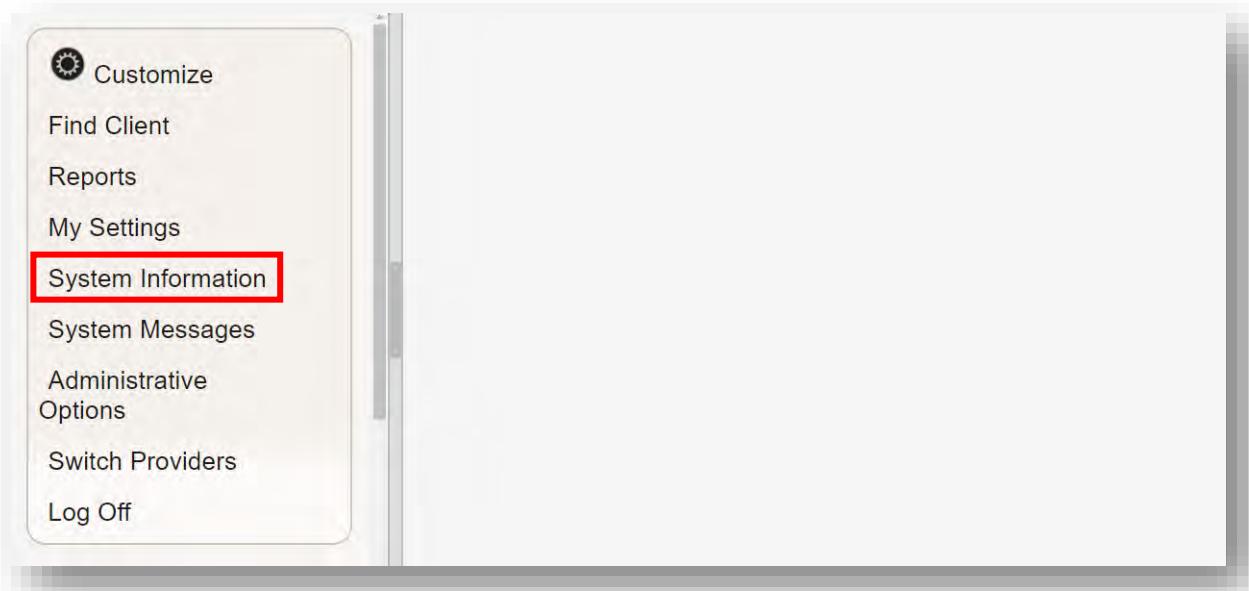
File Name: **Browse...**

System Information and Messages

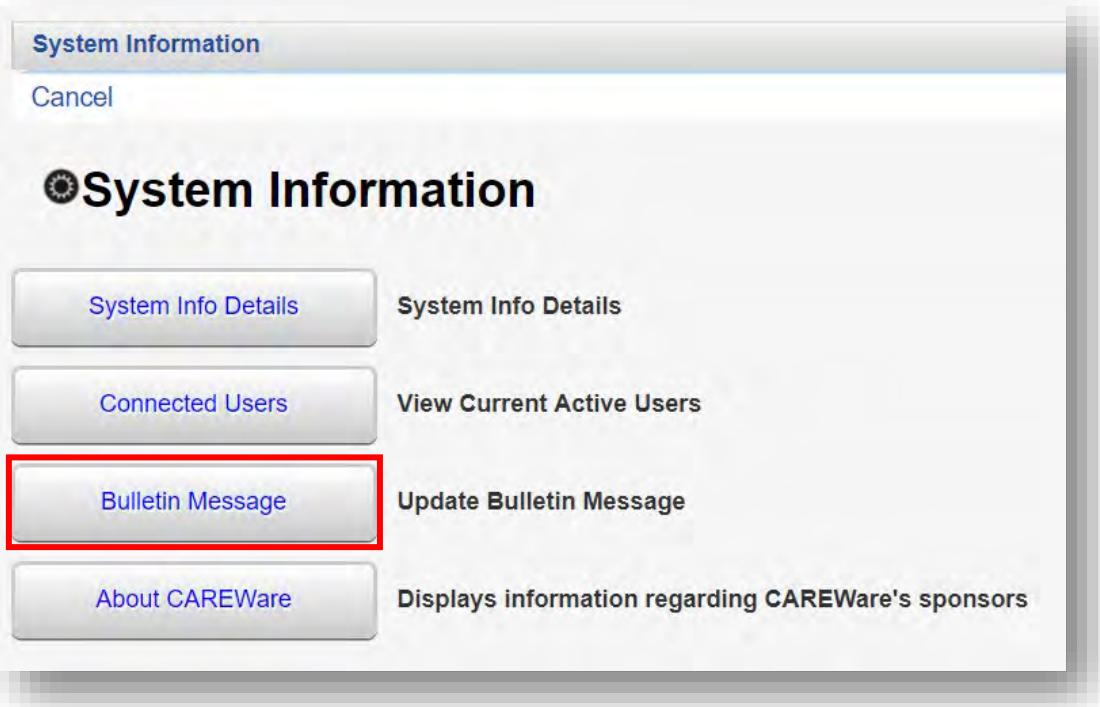
System Information

System Information will provide CAREWare administrators the current CAREWare Business Tier version, the number of clients in your agency database, currently connected users, etc.

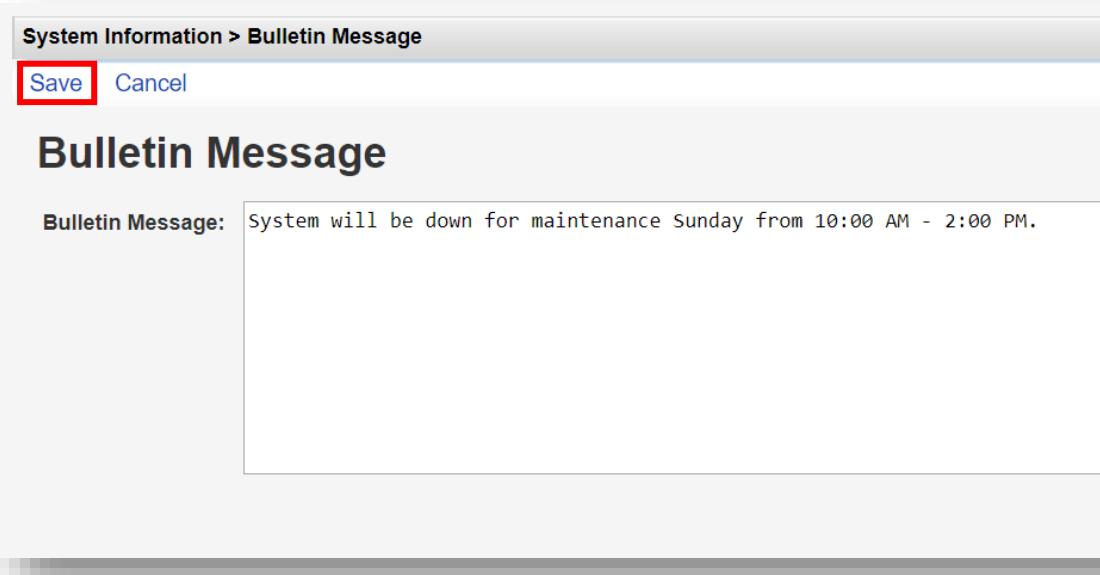
1. Select System Information from the Main Menu.



2. Select **Bulletin Message**.



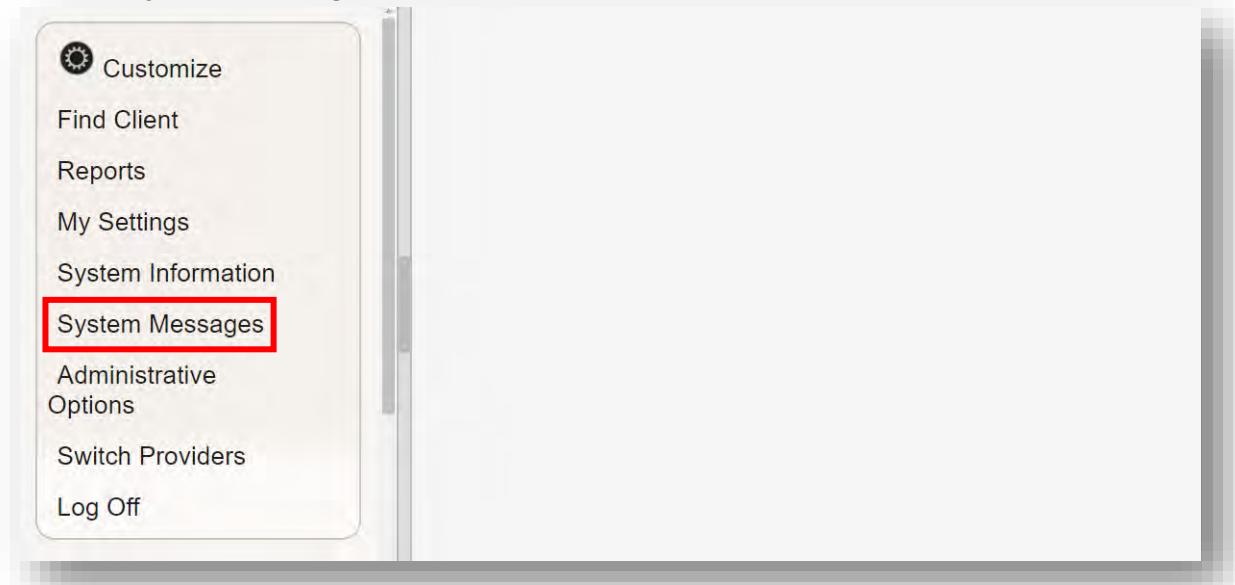
3. Here, you can publish a “bulletin message” that will appear on all users’ screens. Enter a message into the text box and click **Save**.



System Messages

System Messages provide CAREWare administrators information regarding Administrative Alarms and allow them to send User Messages.

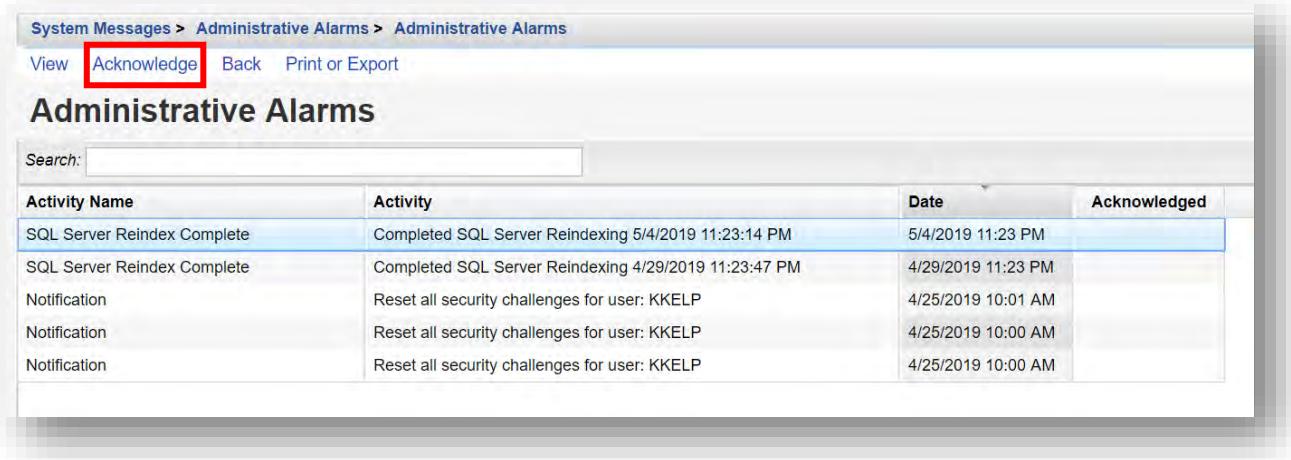
1. Select **System Messages** from the **Main Menu**.



2. Select **Administrative Alarms**. Administrative alarms are system notifications and are typically user-related, regarding attempted permission violations or account locks or unlocks.



3. After review, Administrative alarms can be cleared/acknowledged, by selecting one or more notifications. Click **Acknowledge** on the action bar.



System Messages > Administrative Alarms > Administrative Alarms

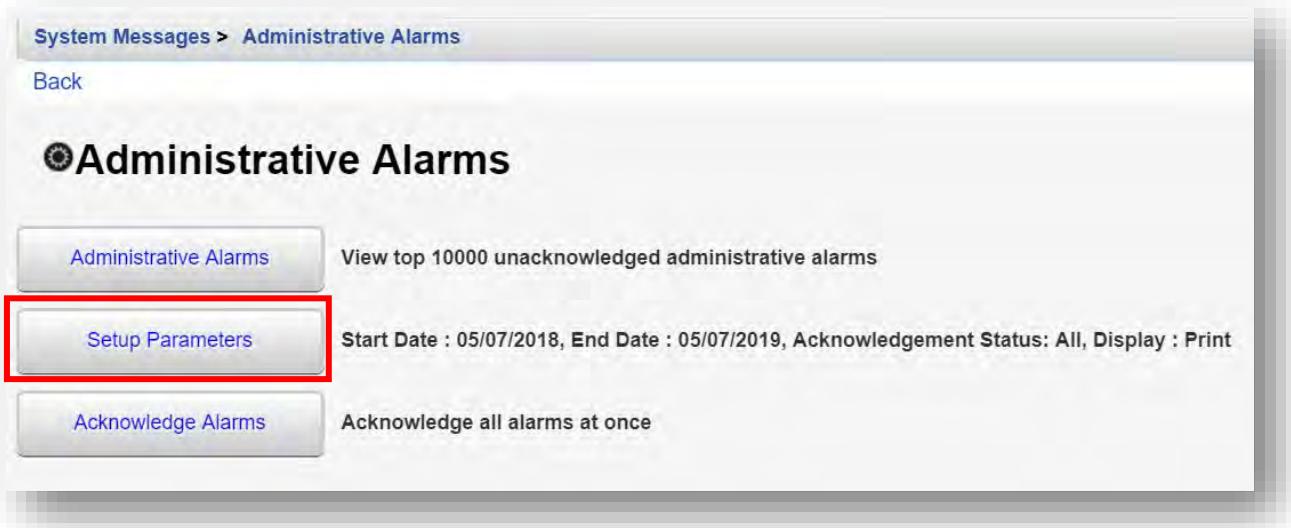
View Acknowledge Back Print or Export

Administrative Alarms

Search:

Activity Name	Activity	Date	Acknowledged
SQL Server Reindex Complete	Completed SQL Server Reindexing 5/4/2019 11:23:14 PM	5/4/2019 11:23 PM	
SQL Server Reindex Complete	Completed SQL Server Reindexing 4/29/2019 11:23:47 PM	4/29/2019 11:23 PM	
Notification	Reset all security challenges for user: KKELP	4/25/2019 10:01 AM	
Notification	Reset all security challenges for user: KKELP	4/25/2019 10:00 AM	
Notification	Reset all security challenges for user: KKELP	4/25/2019 10:00 AM	

4. Administrative alarms can also be sorted and printed like other reports in CAREWare. Select **Setup Parameters** from the **Administrative Alarms** link menu.



System Messages > Administrative Alarms

Back

Administrative Alarms

Administrative Alarms View top 10000 unacknowledged administrative alarms

Setup Parameters Start Date : 05/07/2018, End Date : 05/07/2019, Acknowledgement Status: All, Display : Print

Acknowledge Alarms Acknowledge all alarms at once

5. Click **Edit** and enter the report specifications. Once complete, click **Save** (this option will take the place of Edit within the action bar). Then, click **Run Report**.

System Messages > Administrative Alarms > Admin Alarm Settings

Edit **Run Report** Back

Admin Alarm Settings

Parameters

Date From: 5/7/2018

Date Through: 5/7/2019

Acknowledgement Status: All

Output Display: Open in New Window

6. Administrative alarms can ALL be cleared or acknowledged automatically. Select **Acknowledge Alarms** from the **Administrative Alarms** link menu. (Note: all alerts will be deleted so should be used with caution.)

System Messages > Administrative Alarms

Back

Administrative Alarms

Administrative Alarms View top 10000 unacknowledged administrative alarms

Setup Parameters Start Date : 05/07/2018, End Date : 05/07/2019, Acknowledgement Status: All, Display : Print

Acknowledge Alarms Acknowledge all alarms at once

